



# **ERP ADMIN MANUAL**

**A Handbook for Administrator**

## Summary

This ERP system is based on ERPNEXT, and this manual is for the staff who has admin access to ERP, and guideline of ERP settings and admin management.

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## Introduction

### **INTRODUCTION**

Man Energy apply ERP system based on ERPNEXT which is a full-featured business management solution that helps SMEs to record all their business transactions in a single system. With this ERP, SMEs can make informed, fact-based, timely decisions to remain ahead of the competition. It serves as the backbone of a business adding strength, transparency, and control to your growing enterprise.

ERP will help you to:

1. Track all invoices and payments.
2. Know what quantity of which product is available in stock.
3. Identify and track your key performance indicators (KPIs).
4. Identify open customer queries.
5. Manage employee payroll.
6. Assign tasks and follow up on them.
7. Maintain a database of all your customers, suppliers, and contacts.
8. Prepare quotations.
9. Track your budgets and spending.
10. Determine effective selling price based on the actual raw material, machinery, and effort cost.
11. Get reminders on maintenance schedules.
12. Publish your website.

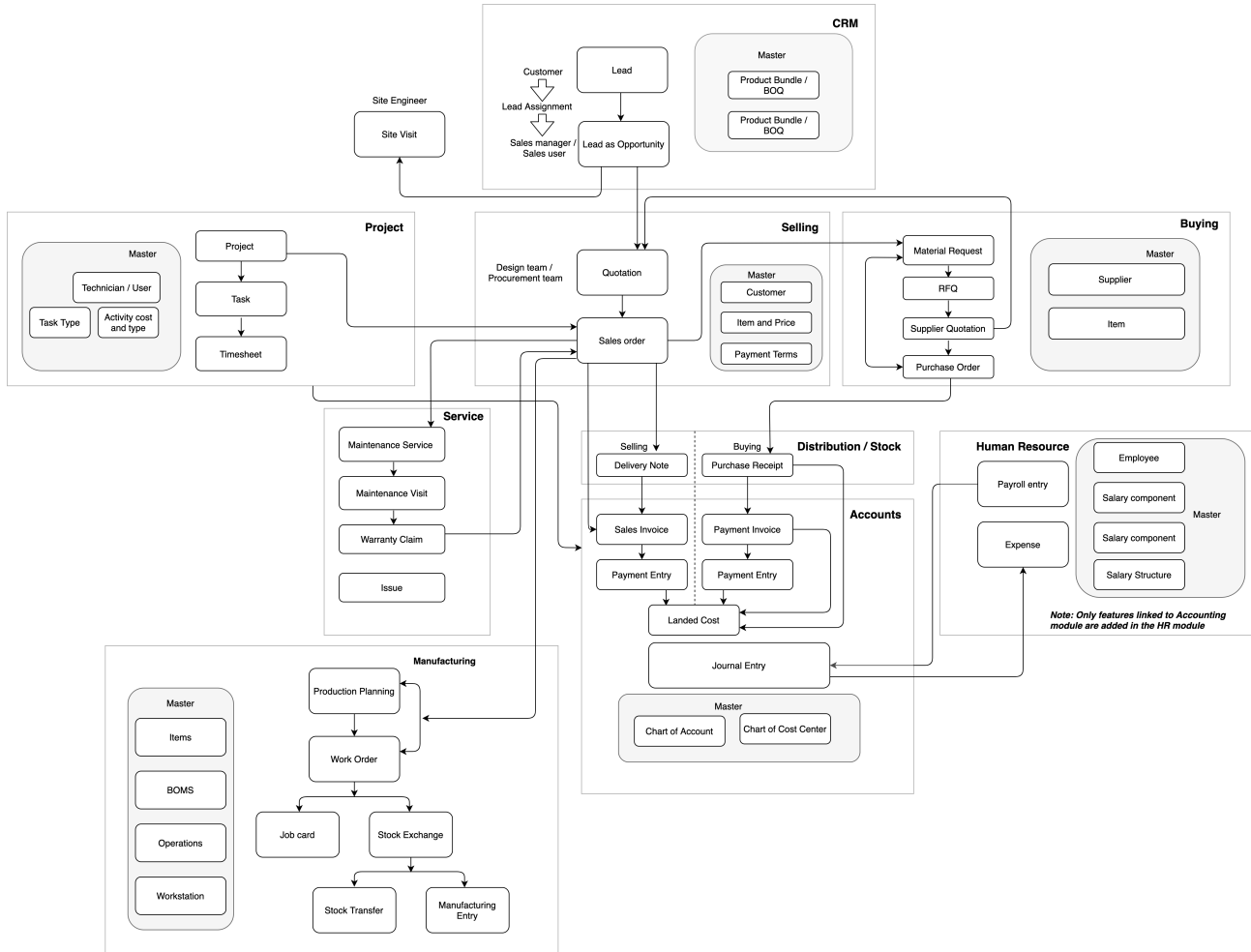
And a ton more.

Before you start managing your Operations in ERP, you must first become familiar with the system and the terms used. You should know:

- Read the Manual
- Create user account in ERP system
- Create your first Customer, Supplier and Item. Add a few more so you get familiar with them.
- Create Customer Groups, Item Groups, Warehouses, Supplier Groups, so that you can classify your Items.
- Complete a standard sales cycle - Lead > Opportunity > Quotation > Sales Order > Delivery Note > Sales Invoice > Payment (Journal Entry)
- Complete a standard purchase cycle - Material Request > Purchase Order > Purchase Receipt > Payment (Journal Entry).
- Complete a manufacturing cycle (if applicable) - BOM > Production Planning Tool > Work Order > Material Issue

## FLOW CHART

Flow Chart in this ERP is very basic scenario but very important in integrating business operation with ERP system, which is as below:





## **CONCEPTS AND TERMS**

Before you start implementation, let's get familiar with the terminology that is used and some basic concepts in ERP.

---

### **1) Basic Concepts**

#### **Company**

This represents the Company records for which ERP is setup. With this same setup, you can create multiple Company records, each representing a different legal entity. The accounting for each Company will be different, but they will share the Customer, Supplier and Item records.

Setup > Company

#### **Customer**

Represents a customer. A Customer can be an individual or an organization. You can create multiple Contacts and Addresses for each Customer.

Selling > Customer

#### **Supplier**

Represents a supplier of goods or services. Your telephone company is a Supplier, so is your raw materials Supplier. Again, a Supplier can be an individual or an organization and has multiple Contacts and Addresses.

Buying > Supplier

#### **Item**

A Product, sub-product or Service that is either bought, sold or manufactured and is uniquely identified.

Stock > Item

#### **Account**

An Account is a heading under which financial and business transactions are carried on. Examples of accounts are "Debtors", "Creditors", "VAT Payable", "Travel Expenses", "Sales", "Share Capital", etc. ERP keeps track of your customers' and suppliers' balances in the background, so you don't need to create dedicated Accounts for them.

Accounting > Chart of Accounts

#### **Address**

An address represents location details of a customer or Supplier. These can be of different locations such as Head Office, Factory, Warehouse, Shop etc.

Selling > Address

#### **Contact**

An individual Contact belongs to a customer or Supplier or is just an independent. A Contact has a name and contact details like email and phone number.

Selling > Contact

#### **Communication**

A list of all Communication with a Contact or Lead. All emails sent from the system are added to the Communication table.

Support > Communication

#### **Price List**

A Price List is a place where different rate plans can be stored. It's a name you give to a set of Item Prices stored under a particular List.

Selling > Price List

Buying > Price List

---

### **2) Accounting**

#### **Fiscal Year**

Represents a Financial Year or Accounting Year. You can operate multiple Fiscal Years at the same time. Each Fiscal Year has a start date and an end date and transactions can only be recorded in this period. When you “close” a fiscal year, its balances are transferred as “opening” balances for the next fiscal year.

Setup > Company > Fiscal Year

#### **Cost Center**

A Cost Center is like an Account, but the only difference is that its structure represents your business more closely than Accounts. For example, in your Chart of Accounts, you can separate your expenses by its type (i.e., travel, marketing, etc.). In your Chart of Cost Centers, you can separate them by product line or business group (e.g., online sales, retail sales, etc.).

Accounting > Chart of Cost Centers

#### **Journal Entry**

A document that contains General Ledger (GL) entries and the sum of Debits and Credits of those entries is the same. In ERP you can update Payments, Returns, etc., using Journal Entries.

Accounting > Journal Entry

#### **Sales Invoice**

A bill sent to Customers for delivery of Items (goods or services).

Accounting > Sales Invoice

#### **Purchase Invoice**

A bill sent by a Supplier for delivery of Items (goods or services).

Accounting > Purchase Invoice

#### **Currency**

ERP allows you to book transactions in multiple currencies. There is only one currency for your book of accounts though. While posting your Invoices with payments in different currencies, the amount is converted to the default currency by the specified conversion rate.

Setup > Currency

### **3) Selling**

#### **Customer Group**

A classification of Customers, usually based on market segment.

Selling > Setup > Customer Group

#### **Lead**

A person who could be a future source of business. A Lead may generate Opportunities. (from: “may lead to a sale” ).

CRM > Lead

#### **Opportunity**

A potential sale. (from: “opportunity for a business” ).

CRM > Opportunity

#### **Quotation**

Customer's request to price an item or service.

Selling > Quotation

#### **Sales Order**

A note confirming the terms of delivery and price of an Item (product or service) by the Customer. Deliveries, Work Orders and Invoices are made on basis of Sales Orders.

Selling > Sales Order

#### **Territory**

A geographical area classification for sales management. You can set targets for Territories and each sale is linked to a Territory.

Selling > Setup > Territory

**Sales Partner\_**

A third-party distributor / dealer / affiliate / commission agent who sells the company' s products usually for a commission.

Selling > Setup > Sales Partner

**Sales Person\_**

Someone who pitches to the Customer and closes deals. You can set targets for Sales Persons and tag them in transactions.

Selling > Setup > Sales Person

**4) Buying\_****Purchase Order\_**

A contract given to a Supplier to deliver the specified Items at the specified cost, quantity, dates and other terms.

Buying > Purchase Order

**Material Request\_**

A request made by a system User, or automatically generated by ERP based on reorder level or projected quantity in Production Plan for purchasing a set of Items.

Buying > Material Request

**Stock (Inventory)\_****Warehouse\_**

A logical Warehouse against which stock entries are made.

Stock > Warehouse

**Stock Entry\_**

Material transfer from a Warehouse, to a Warehouse or from one Warehouse to another.

Stock > Stock Entry

**Delivery Note\_**

A list of Items with quantities for shipment. A Delivery Note will reduce the stock of Items for the Warehouse from where you ship. A Delivery Note is usually made against a Sales Order.

Stock > Delivery Note

**Purchase Receipt\_**

A note stating that a particular set of Items were received from the Supplier, most likely against a Purchase Order.

Stock > Purchase Receipt

**Serial Number\_**

A unique number given to a particular unit of an Item.

Stock > Serial Number

**Batch\_**

A number given to a group of units of a particular Item that may be purchased or manufactured in a group.

Stock > Batch

**Stock Ledger Entry\_**

A unified table for all material movement from one warehouse to another. This is the table that is updated when a Stock Entry, Delivery Note, Purchase Receipt, and Sales Invoice (POS) is made.

**Stock Reconciliation\_**

Update Stock of multiple Items from a spreadsheet (CSV) file.

Stock > Stock Reconciliation

**Quality Inspection\_**

A note prepared to record certain parameters of an Item at the time of Receipt from Supplier, or Delivery to Customer.

Stock > Quality Inspection

### **Item Group\_**

A classification of Item.

Stock > Setup > Item Group

### **Human Resource Management\_**

#### **Employee\_**

Record of a person who has been in present or past, in the employment of the company.

Human Resources > Employee

#### **Leave Application\_**

A record of an approved or rejected request for leave.

Human Resource > Leave Application

#### **Leave Type\_**

A type of leave (e.g., Sick Leave, Maternity Leave, etc.).

Human Resource > Leave and Attendance > Leave Type

#### **Payroll Entry\_**

A tool that helps in creation of multiple Salary Slips for Employees.

Human Resource > Payroll Entry

#### **Salary Slip\_**

A record of the monthly salary given to an Employee.

Human Resource > Salary Slip

#### **Salary Structure\_**

A template identifying all the components of an Employees' salary (earnings), tax and other social security deductions.

Human Resource > Salary and Payroll > Salary Structure

#### **Appraisal\_**

A record of the performance of an Employee over a specified period based on certain parameters.

Human Resources > Appraisal

#### **Appraisal Template\_**

A template recording the different parameters of an Employees' performance and their weightage for a particular role.

Human Resources > Employee Setup > Appraisal Template

#### **Attendance\_**

A record indicating presence or absence of an Employee on a particular day.

Human Resources > Attendance

### **5) Manufacturing\_**

#### **Bill of Materials (BOM)\_**

A list of Operations and Items with their quantities, that are required to produce another Item. A Bill of Materials (BOM) is used to plan purchases and do product costing.

Manufacturing > BOM

#### **Workstation\_**

A place where a BOM operation takes place. It is useful to calculate the direct cost of the product.

Manufacturing > Workstation

#### **Work Order\_**

A document signaling production (manufacture) of a particular Item with specified quantities.

Manufacturing > Work Order

#### **Production Planning Tool\_**

A tool for automatic creation of Work Orders and Purchase Requests based on Open Sales Orders in a given period.

Manufacturing > Production Planning Tool

---

## 6) **Website\_**

### **Blog Post\_**

A short article that appears in the “Blog” section of the website generated from the ERP website module. Blog is a short form of “Web Log” .

Website > Blog Post

### **Web Page\_**

A web page with a unique URL (web address) on the website generated from ERP.

Website > Web Page

---

## 7) **Setup / Customization\_**

### **Custom Field\_**

A user defined field on a form / table.

Setup > Customize ERP > Custom Field

### **Global Defaults\_**

This is the section where you set default values for various parameters of the system.

Setup > Data > Global Defaults

### **Print Heading\_**

A title that can be set on a transaction just for printing. For example, you want to print a Quotation with a title “Proposal” or “Pro forma Invoice” .

Setup > Branding and Printing > Print Headings

### **Terms and Conditions\_**

Text of your terms of contract. In Sales/Purchase transactions there might be certain Terms and Conditions based on which the Supplier provides goods or services to the Customer. You can apply the Terms and Conditions to transactions and they will appear when printing the document. To know about Terms and Conditions, [click here](#)

Selling > Setup > Terms and Conditions

### **Unit of Measure (UOM)\_**

How quantity is measured for an Item. E.g., Kg, No., Pair, Packet, etc.

Stock > Setup > UOM

## Setting Up

### **BASIC SETUP**

#### ➤ **Company Setup**

A company is a legal entity made up of an association of people carrying on a commercial or industrial enterprise.

In ERP, the first Company is created when an ERP account is set up. For each Company, you can set a domain as manufacturing, retail, or services depending on the nature of your business activity.

If you have more than one company, you can add them from:

Home > Accounting > Company

#### **1. How to create a new Company\_**

1. Go to the Company list, click on New.
2. Enter the name, abbreviation, and default currency for the company.
3. Save.

The abbreviation for your company is created by default. For example, FT for Frappe Technologies. The abbreviation helps differentiate the assets of one company from another.

The abbreviation also appears in various accounts, cost centers, taxes templates, warehouse, etc, of your company.

You can also attach a company logo and add a description for the company.

E

> Company > Unico Plastics Inc.

Q Search or type a command (Ctrl + G)

Help

BS

Unico Plastics Inc.

Create Tax Template

Create

<

>

Print

...

Save

Unico

Assigned To

+

Attachments

unico201e83.png

unicoc2af9e.png

unico.png

Attach File

Reviews

+

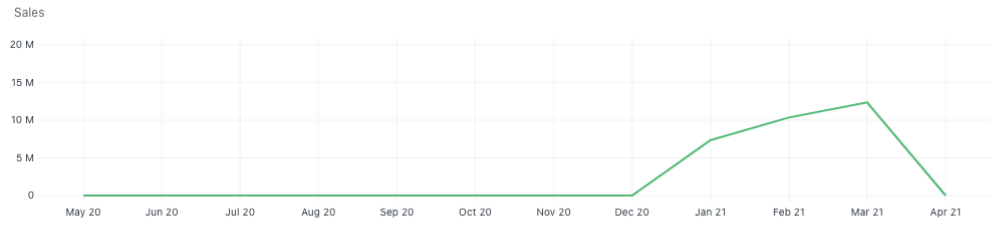
Shared With

+

Tags

Add a tag ...

Sales



Connections

Pre Sales

Quotation

+

Orders

Sales Order

+

3 Delivery Note

1

+

4 Sales Invoice

4

+

Support

Issue

+

Projects

Project

+

#### **1.1 Multi-Company Structure**

Let's assume you run a group of companies, some may be larger companies and some may be smaller that are a part of the larger company(s).

In ERP, you can set up multiple companies. The company structure can be parallel, i.e., sister companies, parent-child companies, or a combination of both.

A parent company is a larger organization which consists of one or more child companies. A child company is a subsidiary of a parent company.

The company tree view displays the overall structure of your company.

## Company Tree

Expand All

...

+ New

Company

### All Companies

- Unico Plastics Inc.
- Unico Plastics Private Limited

Once you build a company tree, ERP will validate if the accounts of the child companies match the accounts in the parent company. All the accounts can be combined in a consolidated chart of accounts statements.

### 1.2 Other Options when Creating a Company

- Domain: The domain of work the company is into. Eg: manufacturing, services, etc. Choose one when setting up your account.
- Is Group: If checked, this becomes a parent company.
- Parent Company: If this is a child company, set the parent from this field i.e., select a group company this company belongs to. If a parent company is set, the chart of accounts for the new company you're creating will be created based on the selected parent company.

### 1.3 Chart of Accounts

For each Company, the master for Chart of Accounts is maintained separately. This allows you to maintain separate accounting for each company as per the legal requirements. You can also import chart of accounts using the [Charts Of Accounts Importer](#).

ERP has localized Chart of Accounts readily available for some countries. When creating a new Company, you can choose to set up the Chart of Account from one of the following options.

- Standard Chart of Accounts
- Based on Existing Company's Chart of Account

## New Company

Not Saved

Save

Company \*

Unico Plastics Private Limited

Unico Plastics Private Limited already exists. Select another name

Abbr \*

UPPL

☐ Is Group

Domain

Parent Company

### Default Values

Default Currency \*

INR

Default Letter Head

Default Holiday List

Default Finance Book

Country \*

India

Create Chart Of Accounts Based On

- ☒ Standard Template
- ☐ Existing Company

Date of Establishment

Note that, if the Parent Company is selected when creating a new Company, the Chart of Accounts will be created based on the existing Parent Company.

#### 1.4 Defaults

Within the Company master, you can set many of the default values for masters and accounts. These default accounts will help you quickly post accounting transactions, where the value for the account will be fetched from the Company master if provided. As soon as the company is created, a default Chart Of Accounts and Cost Center is automatically created.

The following defaults can be set for a company:

- Default Letter Head
- Default Holiday List
- Standard Working Hours
- Default Terms and Conditions
- Country
- Tax ID
- Date of Establishment

#### 2. Features

##### 2.1 Monthly Sales Target

Set the monthly sales target number in the company currency, for example, \$10,000. Total monthly sales will be visible once transactions are made. To know more, [click here](#).

##### 2.2 Account Settings

Some of the following accounts will be set by default when you create a new company, others can be created. The accounts can be seen in the [Chart of Accounts](#). These values can be changed later on if needed.

- Default Bank Account
- Default Cash Account
- Default Receivable Account
- Round Off Account
- Round Off Cost Center
- Write Off Account
- Discount Allowed Account
- Discount Received Account
- Exchange Gain / Loss Account
- Unrealized Exchange Gain/Loss Account
- Default Payable Account
- Default Employee Advance Account
- Default Cost of Goods Sold Account
- Default Income Account
- Default Deferred Revenue Account
- Default Deferred Expense Account
- Default Payroll Payable Account
- Default Expense Claim Payable Account
- Default Cost Center
- Credit Limit
- Default Payment Terms Template

##### 2.3 Stock Settings

The perpetual Inventory feature would lead to Stock transactions impacting the company's books of accounts. Know more [here](#). It is enabled by default.

- Default Inventory Account



- Stock Adjustment Account
- Stock Received But Not Billed
- Expenses Included In Valuation

E > Company > Unico Plastics Inc.

Q Search or type a command (Ctrl + G)



Help

BS

Unico Plastics Inc.

Create Tax Template

Create



Save

#### Stock Settings

☒ Enable Perpetual Inventory

☐ Enable Perpetual Inventory For Non Stock Items

Default Inventory Account

Stock In Hand - UP

Stock Adjustment Account

Stock Adjustment - UP

Stock Received But Not Billed

Stock Received But Not Billed - UP

Service Received But Not Billed

Expenses Included In Valuation

Expenses Included In Valuation - UP

## 2.4 Fixed Asset Defaults

For managing fixed assets in a company, the following accounts are needed. Most of them will be created by default. They can be seen in the [Chart of Accounts](#).

- Accumulated Depreciation Account
- Depreciation Expense Account
- Series for Asset Depreciation Entry (Journal Entry)
- Expenses Included In Asset Valuation
- Gain/Loss Account on Asset Disposal
- Asset Depreciation Cost Center
- Capital Work In Progress Account
- Asset Received But Not Billed

E > Company > Frappe

Q Search or type a command (Ctrl + G)



Help

A

Frappe

View

Manage



Save

#### Fixed Asset Defaults

☒ Enable Finance Books

Default Finance Book \*

Default Finance Book

Accumulated Depreciation Account

Accumulated Depreciations - F

Depreciation Expense Account

Depreciation - F

Series for Asset Depreciation Entry (Journal Entry)

Expenses Included In Asset Valuation

Expenses Included In Asset Valuation - F

Repair and Maintenance Account

Repair and Maintenance Account - F

Gain/Loss Account on Asset Disposal

Gain/Loss on Asset Disposal - F

Asset Depreciation Cost Center

Main - F

Capital Work In Progress Account

Asset Received But Not Billed

Asset Received But Not Billed - F

If you wish to book your accounting entries against different [Finance Books](#), check the Enable Finance Books box and set a Default Finance Book.

## 2.5 HRA Settings

Set the default Component for the following Salary Components.

For the UAE user, setting the default value in this section will help in Employee Tax Declaration calculations, especially for HRA exemption amount.

- Basic Component
- HRA Component
- Arrear Component

## 2.6 Bank Remittance Settings

Using the Payment Order feature (in Accounts), you can give a single document of transfer for multiple bank transfers. Updating the value in the following fields will help you generate Bank Remittance in a format which can be accepted and uploaded on the bank's portal.

A payment order allows a user to combine several payment entries/payment requests into a single document. Bank Remittance allows a user to send that single document to the bank as text format, this text format can be manually uploaded to Kotak bank payments platform.

Client Code and Product Code are codes given by the bank to you. This is required to be added in the text file as per the format specified by Kotak bank.

## 2.7 Budget

Exception Budget Approver Role: The role selected here can bypass the set budget to approve expenses.

## 2.8 Company Info

For reference, the following details of your company can be saved in ERP:

- Date of Incorporation
- Phone No
- Fax
- Email
- Website
- Address
- Registration Details

Note: When setting the address here, it is important to tick the 'Is Your Company Address' checkbox.

CRM > Address > Unico Plastics PVT. LTD.-Billing

Search or type a command (Ctrl + G)

Help

BS

Unico Plastics PVT. LTD.-Billing

Enabled

Links < > Print ... Save

Reference

☒ Is Your Company Address

Links

| <input type="checkbox"/> | No. | Link Document Type | Link Name                | Link Title          |                      |
|--------------------------|-----|--------------------|--------------------------|---------------------|----------------------|
| <input type="checkbox"/> | 1   | Company            | Unico Plastics PVT. LTD. | Unico Plastics Inc. | <a href="#">Edit</a> |

Add Row

Add a comment

Ctrl+Enter to add comment

Comment

## 2.9 Deleting all Company Transactions

You can delete all transactions (Orders, Invoices) of a Company. *Use with caution*, transactions once deleted cannot be recovered.

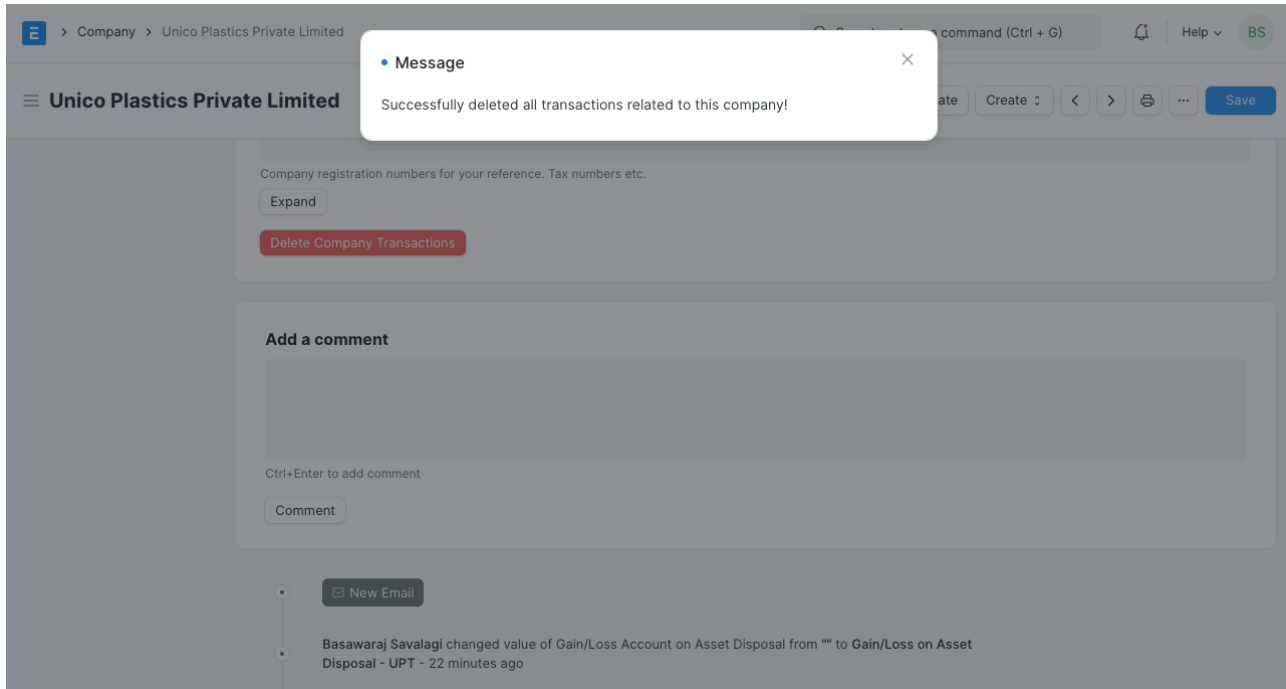
## Requirements

- The User has to be a System Manager

- The User has to be the creator of the Company

#### Steps\_

1. Click on the Delete Transactions button under Manage
2. Verify your password
3. Enter Company name for confirmation



And you're done. The master data like Item, Account, Employee, BOM etc. will remain as it is.

#### What is affected?\_

- Sales/Purchase Orders/Invoices Receipts/Notes will be deleted.
- The monthly sales and sales history will be cleared.
- All notifications will be cleared.
- Lead Addresses to which the Company is linked will be deleted.
- All communications linked to the Company will be deleted.
- All naming series will be reset.
- Stock Entries linked to a Warehouse of this Company will be deleted.

#### 2.10 Change Parent Company

You can change the Parent Company of an existing company. Go to the Parent Company field, select the Company from the list, and save the form.

E

> Company > Air Case

Search or type a command (Ctrl + G)

Help

A

Air Case

View Manage < > Print ... Save

yesterday

You created this 3 months ago

Default Currency \*

INR

Country \*

India

☐ Is Group

Tax ID

Domain

Date of Establishment

Parent Company

Address & Contact

Chart of Accounts

Create Chart Of Accounts Based On

Standard Template

Chart Of Accounts Template

India - Chart of Accounts

## ➤ Setting Up Taxes

Taxes are compulsory contributions to the state/country revenue.

One of the primary motivators for compulsory use of accounting tools is the calculation of taxes. ERP allows you to make configurable tax templates that you can apply to your sales or purchase transactions.

### 1. Tax Accounts

For Tax Accounts that you want to use in the tax templates, go to:

Home > Accounting > Chart of Accounts

Select an account and click on edit. Select the 'Account Type' as 'Tax' for the account.

### 2. Sales Taxes and Charges Template

Sales Taxes and Charges Template fetched taxes for your sales transactions like Sales Order and Sales Invoice. Read Sales Taxes and Charges Template to know more.

### 3. Purchase Taxes and Charges Template

Purchase Taxes and Charges Template fetched taxes for your sales transactions like Purchase Order and Purchase Invoice. Read Purchase Taxes and Charges Template to know more.

### 4. Item Tax Template

The tax set in Item Tax Template applies specifically to an Item or an Item Group. It is given preference over the Sales/Purchase Tax Template. Read Item Tax Template to know more.

### 5. Tax Category

Tax category helps in automatically applying sales/purchase tax templates in your transactions based on the customer/supplier chosen. Read Tax Category to know more.

## ➤ Setting Company Sales Goal

**Defining and achieving sales goals/targets can help your company reach new goals and increase revenue.**

1. Monthly sales targets can be set for a Company via the Company master under the Sales Settings section. By default, the Company master dashboard displays month-wise past sales stats.

## Wind Power LLC

Menu Save

### Comments 0

ASSIGNED TO

Assign +

ATTACHMENTS

Attach File +

TAGS

Add a tag...

SHARED WITH



0

You edited this  
30 minutes ago

You created this  
30 minutes ago

Cost Centers Chart of Accounts

### DASHBOARD



This is based on transactions against this Company. See timeline below for details

### Sales



This month: \$ 201,300.000

- You can set the **Sales Target** field to track progress against the graph:

## Wind Power LLC

Menu Save

### Default Terms

### Chart Of Accounts Template

### Default Currency

USD

### SALES

#### Sales Target

0.000

#### Total Monthly Sales

\$ 201,300.00

### ACCOUNTS SETTINGS

#### Default Bank Account

#### Default Payable Account

Creditors - WPL

#### Default Cash Account

Cash - WPL

#### Default Cost of Goods Sold Account

Cost of Goods Sold - WPL

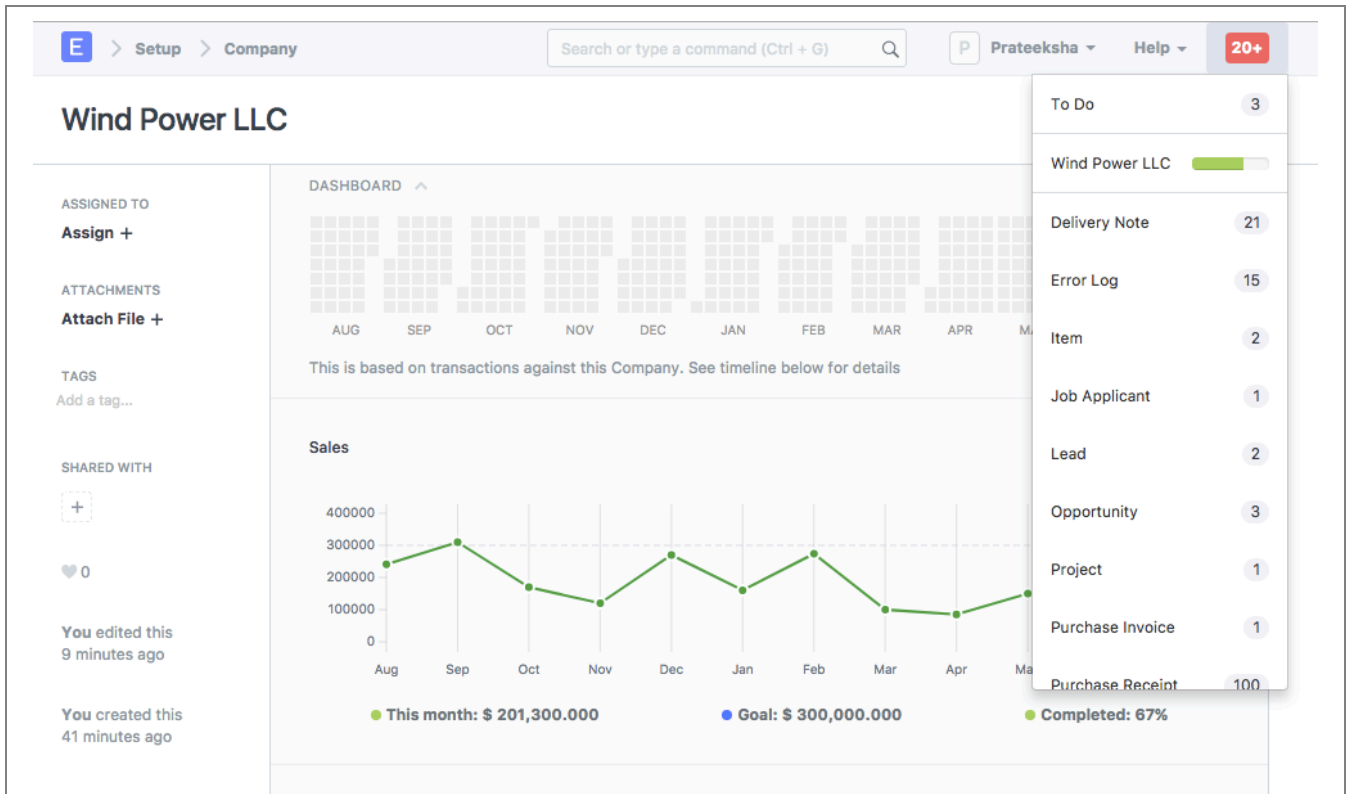
#### Default Receivable Account

Debtors - WPL

#### Default Income Account

Sales - WPL

- The target progress is also shown in notifications:



## Global Defaults

Default values for documents like Currency, Fiscal Year, etc, can be set from Global Defaults.

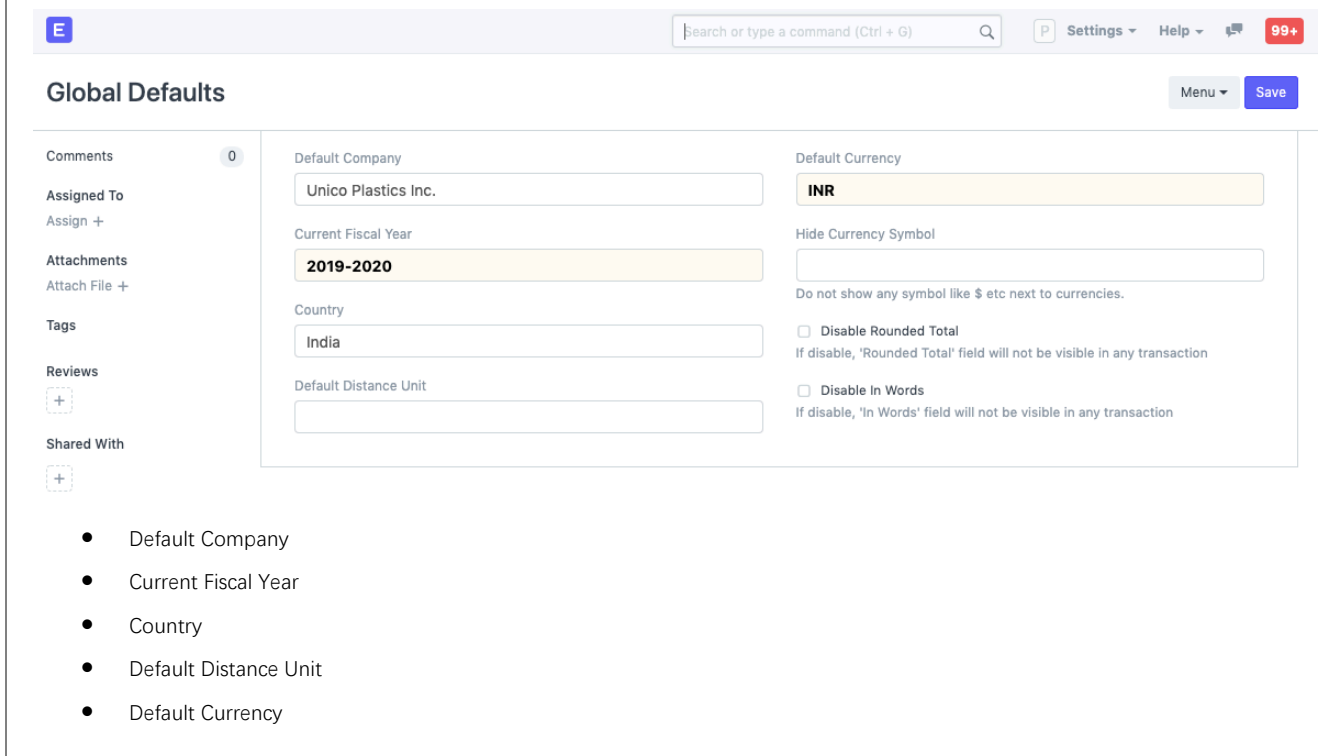
The values set here will impact all users and the default values for various fields will be set for them.

To access Global Defaults, go to:

Home > Settings > Global Defaults

Or search from the search bar.

Whenever a new document is created, these values will be set as default.



**Global Defaults**

Menu Save

**Comments** 0

**Assigned To**  
Assign +

**Attachments**  
Attach File +

**Tags**

**Reviews**  
+

**Shared With**  
+

**Default Company**  
Unico Plastics Inc.

**Current Fiscal Year**  
2019-2020

**Country**  
India

**Default Distance Unit**

**Default Currency**  
INR

**Hide Currency Symbol**  
Do not show any symbol like \$ etc next to currencies.

☐ Disable Rounded Total  
If disable, 'Rounded Total' field will not be visible in any transaction

☐ Disable In Words  
If disable, 'In Words' field will not be visible in any transaction

- Default Company
- Current Fiscal Year
- Country
- Default Distance Unit
- Default Currency

- Hide Currency Symbol
- Disable Rounded Total
- Disable In Words

The Default Distance Unit is used to calculate the total distance in [Delivery Trips](#).

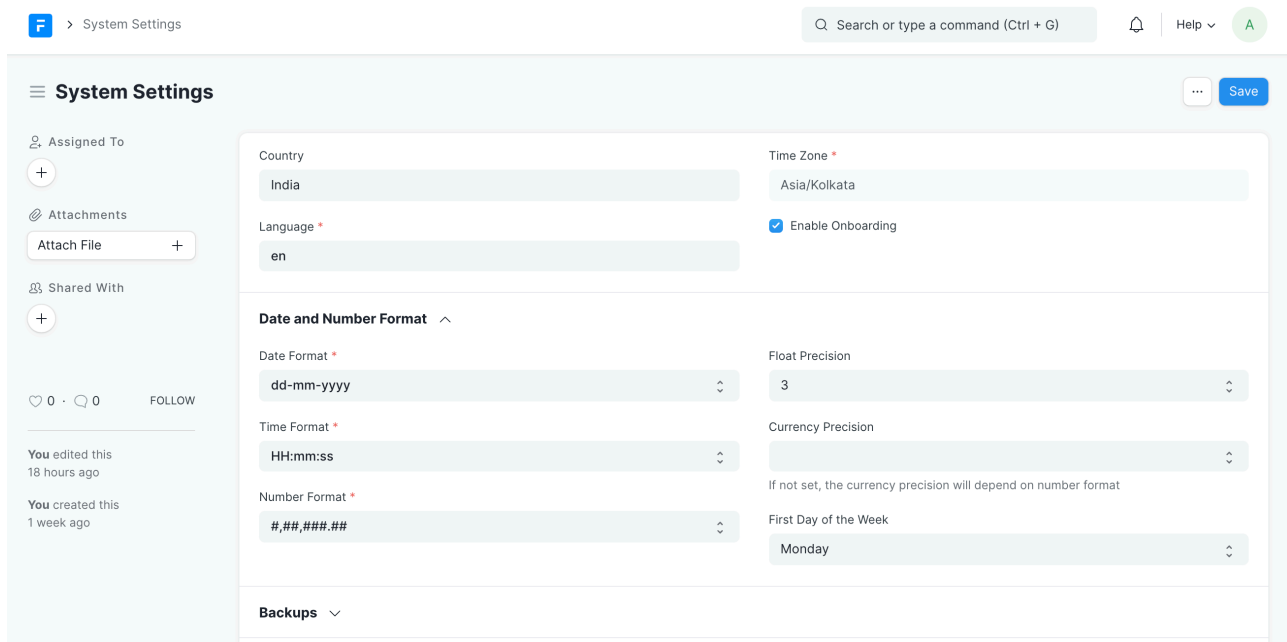
## ➤ System Settings

**System Setting contains settings for system-wide configuration of the account.**

You can localize ERP to use particular timezone, date, number or currency format, and also set global session expiry via System Settings.

To open System Settings, go to:

Home > Settings > System Settings



The screenshot shows the 'System Settings' page. On the left, there's a sidebar with 'Assigned To', 'Attachments' (with an 'Attach File' button), and 'Shared With'. The main content area is titled 'System Settings' and includes a 'Save' button. The settings are organized into sections: 'Country' (set to India), 'Language' (set to en), 'Time Zone' (set to Asia/Kolkata), 'Date and Number Format' (with sub-sections for Date Format: dd-mm-yyyy, Time Format: HH:mm:ss, and Number Format: #,##,###.##), 'Float Precision' (set to 3), 'Currency Precision' (set to 3), 'First Day of the Week' (set to Monday), and 'Backups'. There's also a checkbox for 'Enable Onboarding' which is checked.

### 1. Sections in System Settings

#### 1.1 General

- **Country:** You can set the default country here, this will be fetched when creating new addresses. If your company has multiple branches in different countries, choose the head office location.
- **Time Zone:** Sets time automatically based on the time zone.
- **Language:** Sets the global language for the ERP account. Then language will be changed in all the menus, transactions, masters, etc.

#### 1.2 Date and Number Format

- **Date Format:** Format in which dates will be displayed. For e.g., dd.mm.yyyy or mm/dd/yyyy. This depends on how dates are formatted in your region.
- **Time Format:** Format in which time will be displayed. You can choose to show (HH:mm:ss) or hide seconds by setting the option as (HH:mm) .
- **Number Format:** Format in which numbers will be formatted. For e.g., 1,000 or 1000.00.
- **Float Precision:** The number of zeros displayed after the decimal point for quantities etc. The range is 2-9. Default is 3.
- **Currency Precision:** Number of zeros displayed after the decimal point for currency values. If left blank, it will be based on the **Number Format**.
- **First Day of the Week:** This can be used to configure the day for start of the week. This affects dynamic filters for week used in list and report views, date selection layout and calendar view.

### 1.3 Backups

In ERP you can backup the database as well as your files. Database backups are created automatically while file backups need to be downloaded explicitly.

This field shows the number of backups after which older ones will be deleted. By default, 3 backups are saved over 24 hours. New backups are automatically created every few hours and the newest backup will overwrite the oldest one. For a backup of files, click on the Download Files Backup button in the Download Backups form.

Keeping regular backups of your system is a good practice in case of any mishap and you want to roll back or just for your records.

### 1.4 Permissions

Using permissions, you can limit user access to document types. The limitation can be based on fields like Company, Territory, Branch, etc. To know more about User Permissions, [click here](#).

If Apply Strict User Permissions checkbox is ticked and User Permission is defined for a DocType for a User, then all the documents where the value of the link is **blank**, will not be shown to that User.

This is done from:

Home > Users and Permissions > Permissions > User Permissions

For example: If you set User Permissions for Territory and set the value as UAE. If the checkbox is unticked, all transactions (sales orders, quotations) with UAE and **blank** will be shown to the users.

If the Apply Strict User Permissions checkbox is ticked, documents, where Territory is blank, will not be shown to the users.

### 1.5 Security

- **Session Expiry:** Number of idle hours after which you'll be logged out of a session. This helps in better security. For example, if there is no activity for 6 hours, your account will be logged out.
- **Session Expiry Mobile:** Session expiry when logged in from a mobile phone.
- **Document Share Key Expiry (in Days):** Number of days after which "document web link" sent via email will be expired.
- **Allow only one session per user:** If you want to use a single set of credentials for multiple users, tick this checkbox. The number of simultaneous sessions can be changed under User master. Mobile phone sessions are not counted here.
- **Allow Login using Mobile Number:** By checking the 'Allow Login using Mobile Number' checkbox, you can log in to ERP using a valid mobile number set in your User account.
- **Allow Login using User Name:** Allow user login via their username set in the [User master](#).
- **Show Full Error and Allow Reporting of Issues to the Developer:** This will display the whole error on the screen and allow reporting issues. If you have technical knowledge in this area, you can get a better idea of the error by reading the whole message.
- **Remove EXIF tags from uploaded images:** Metadata stored in image files in the EXIF file format can be exploited to get sensitive user information. This option lets users remove that data from the images before uploading.
- **Allow Older Web View Links (Insecure):** The configuration that allows web links with no expiry. Note: Older web links (generated in v13) are considered to be insecure as they had no expiry. It is recommended to keep this configuration unchecked.

### 1.6 Password

- **Force User to Reset Password:** Number of days after which a password reset is mandatory. 0 means no limit.
- **Enable Password Policy:** Enables a password strength checker so that users have to use strong passwords for their login.
- **Minimum Password Score:** Score for the password strength checker
  - 2 is medium
  - 3 is strong
  - 4 is very strong

The complexity is based on the number of characters, capitalization, special characters, etc.

- **Reset Password Link Expiry Duration:** This configuration is used to set the duration after which the newly created reset password link gets expired. The default expiry for reset password link is 20 minutes. Setting it to "0 Seconds" disables the "Reset Password Link Expiry" functionality.



- **Password Reset Link Generation Limit:** Using this configuration the limit for number of password reset requests per hour can be set. The default limit is 3. Setting it to 0 will allow unlimited password reset link generation requests.

### 1.7 Brute Force Security

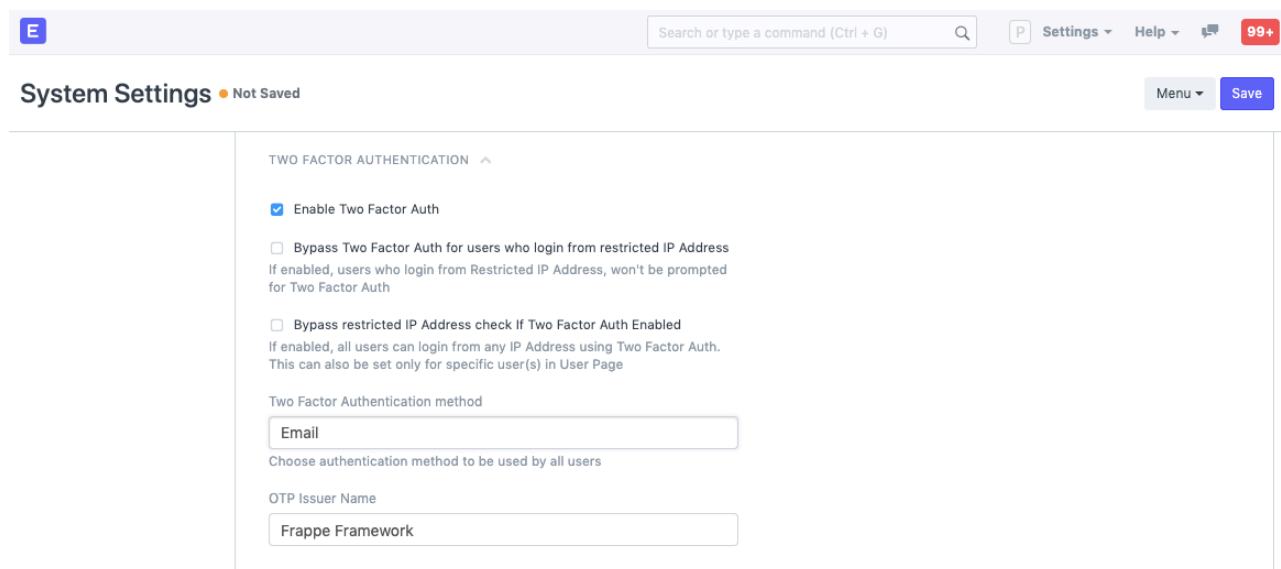
- **Allow Consecutive Login Attempts:** Consecutive logins after which you'll be locked out of the account for a specific period. This helps if an intruder tries to log in to your account.
- **Allow Login After Fail:** Seconds after which a login attempt will be allowed after consecutive unsuccessful attempts.

### 1.8 Two Factor Authentication

Settings for Two Factor Authentication can be configured here.

On ticking 'Enable Two Factor Auth', the following two options will be seen.

- **Bypass Two Factor Auth for users who log in from restricted IP Address:** Users who log in from restricted IP addresses will not be asked for Two Factor Authentication. You can restrict IPs from User master under the Restrict IP field.
- **Bypass restricted IP Address check If Two Factor Auth Enabled:** If checked, all users can log in with Two Factor Authentication regardless if their IP is restricted or not.
- **Two Factor Authentication method:** Select the authentication method to be used - OTP App, SMS, or email.
- **Expiry time of QR Code Image Page:** Expiry time for QRCode image if "OTP App" is selected in the method.
- OTP Issuer Name of the One Time Password.



**System Settings** ● Not Saved

**TWO FACTOR AUTHENTICATION**

☒ Enable Two Factor Auth

☐ Bypass Two Factor Auth for users who login from restricted IP Address  
If enabled, users who login from Restricted IP Address, won't be prompted for Two Factor Auth

☐ Bypass restricted IP Address check If Two Factor Auth Enabled  
If enabled, all users can login from any IP Address using Two Factor Auth. This can also be set only for specific user(s) in User Page

Two Factor Authentication method

Email

Choose authentication method to be used by all users

OTP Issuer Name

Frappe Framework

### 1.9 Email

- **Email Footer Address:** Organization name, address, and other details can be added here. This will be set as default in all outgoing mails.
- **Disable Standard Email Footer:** If ticked, the standard email footer will be disabled for outgoing emails.
- **Hide footer in auto-email reports:** If ticked, footers will be hidden in [Auto Email reports](#).
- **Send document web view link in the email:** ERP has a portal view available from where parties like Customers and Suppliers can sign up and view their order history. When you email a transaction to your party, you can also send a web link to view the same document on the portal of your ERP account. This option will enable this functionality.

## EMAIL ^

### Email Footer Address

Unico Plastics,  
101 Industrial Avenue, Fort Mumbai.  
Email: info@unicoplasticsinc.com

- ☐ Disable Standard Email Footer
- ☐ Hide footer in auto email reports
- ☐ Send document Web View link in email

Your organization name and address for the email footer.

## 1.10 Chat

- **Enable Chat:** This option will enable the in-app chat which can be used to communicate with other employees.

## 1.10 System Updates

- **Disable System Update Notification:** This option disables all version update notifications triggered by the application.

## > Letter Head

A Letter Head contains your organization's name, logo, address, etc which appears at the top portion in documents.

Every company has a default Letter Head. These Letter Head values are generally set as Header and Footer in the documents. In ERP, you can capture these details in the Letter Head master.

These details will appear in the Print Format of transactions like Sales Order, Sales Invoice, Salary Slip, Purchase Order, etc. In ERP, the Letter Head is only for setting up the top part of the document, other content is pre-formatted and can be configured via [Print Format](#) and [Print Headings](#).

To access Letter Head, go to:

Home > Settings > Letter Head

### 1. How to create a Letter Head

1. Go to the Letter Head list, click on New.
2. Enter a name for the Letter Head. You can create a separate Letter Head for different office locations.
3. Choose whether based on image or HTML.
4. You can enter details in a Letter Head by using:
  - Logo Image: Click on the Attach button to attach an image. Once the image is inserted, HTML for it will be generated automatically.
  - Other information (like Address, tax ID, etc.) that you want to put on your Letter Head.

E
>
Letter Head

Search or type a command (Ctrl + G)

P
Settings
Help
99+

**Unico Plastics** • Enabled

Menu
Save

**Comments**
0

**Assigned To**  
 Assign +

**Attachments**  
unico-letterhead.jpg X  
 Attach File +

**Tags**  
 Add a tag ...

**Reviews**  
+

**Letter Head Based On**  

Image

☐ Disabled  
☐ Default Letter Head

**LETTER HEAD IMAGE**  

Image

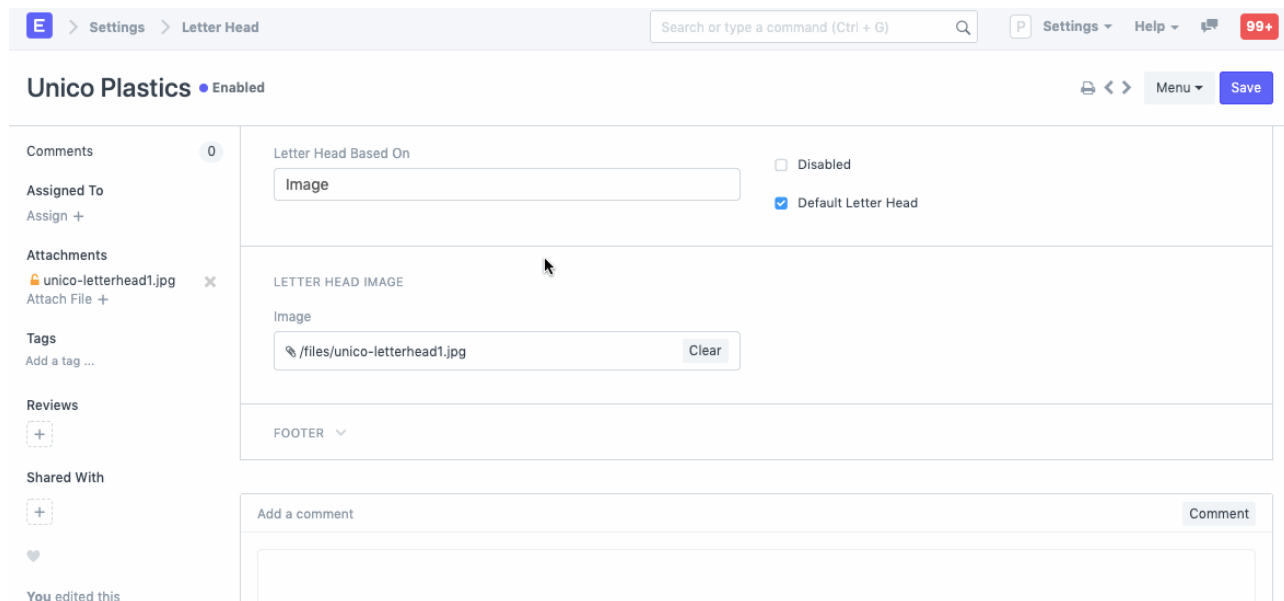
Clear

**FOOTER**

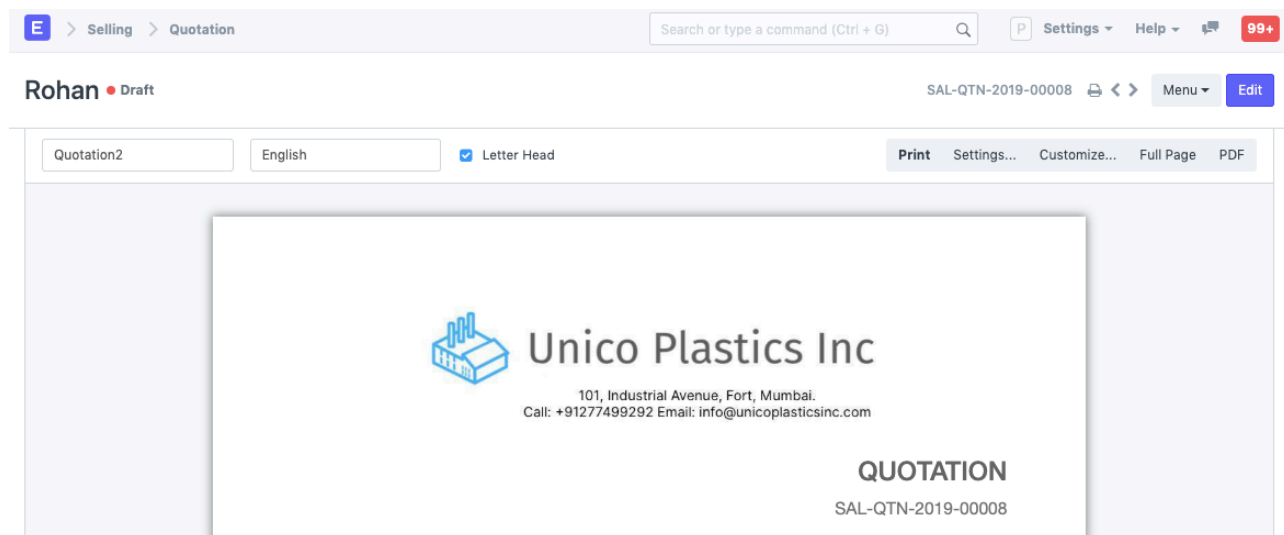
If you want to make this the default Letter Head, click on "Default Letter Head".

5. After entering values in the Header and Footer section, save the Letter Head.

You can set the Letter Head based on HTML to make changes to it:



This is how the Letter Head looks in a document's print.



Note that Footer will be visible only when the document's print is seen in the PDF. Footer will not be visible in the HTML based print preview.

## **DATA IMPORT**

### **➤ Data Management**

You can import, export bulk edit data from and to spreadsheet files (.csv) from the Data Import Export Tool. This tool will be very helpful initially to setup your data from other systems.

### **➤ Data Import Tool**

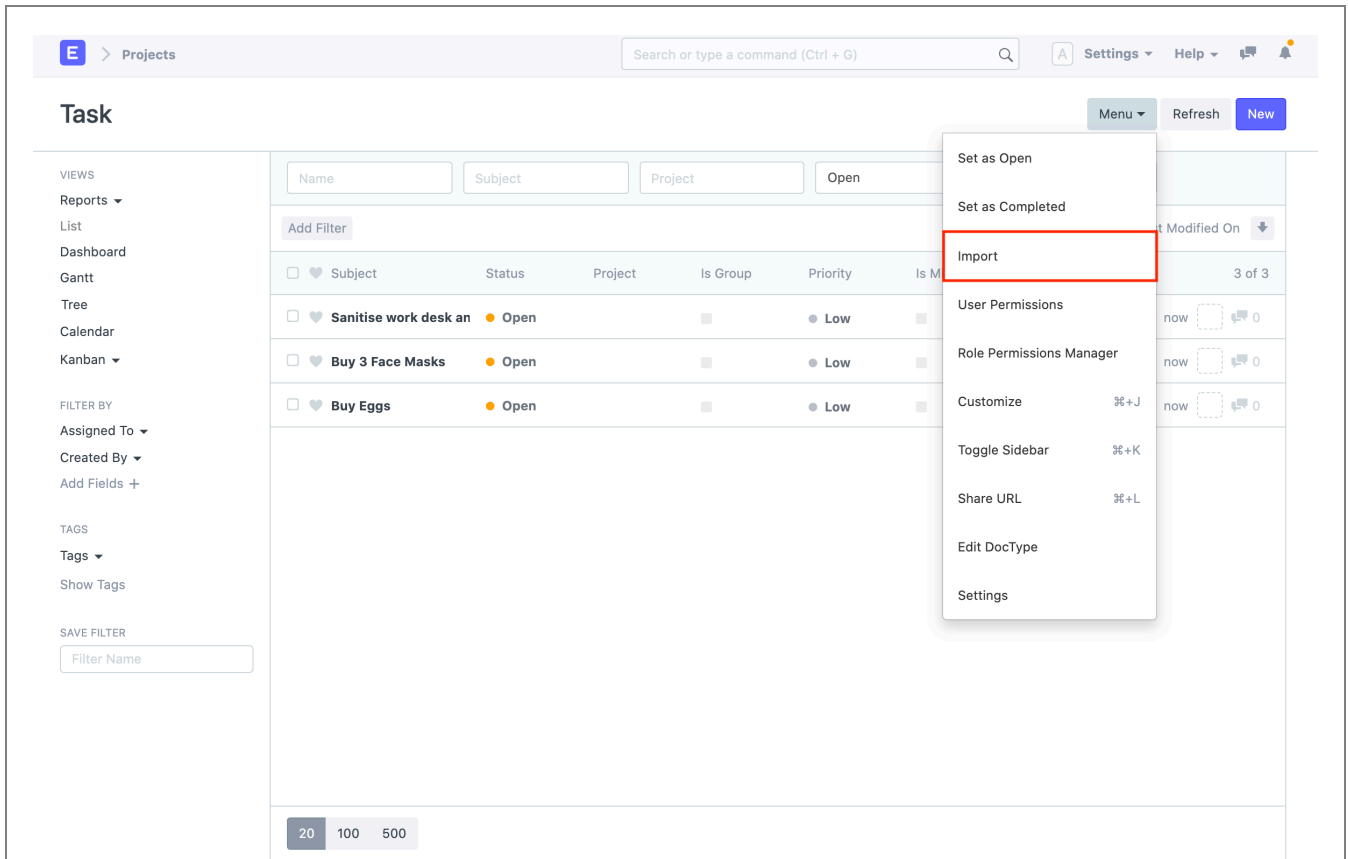
**The Data Import Tool lets you import records from a CSV/Excel file.**

Data Import Tool is an easy way to upload (or edit) bulk data (especially master data) into the system.

To begin importing data, go to:

Home > Data Import and Settings > Import Data

Or go to the Document you want to import and click on Menu > Import:



Before using Data Import **ensure** that you have all of your data ready.

### 1. Inserting New Records

Let's say you want to import the list of Customers from your old system into ERP. The first step is to download a template in which we can enter our data.

#### 1.1 Download the Template

1. Go to Customer List, click on Menu > Import. Click on **New**.
2. Select Import Type as Insert New Records.
3. Click on **Save**.
4. Now, click on **Download Template**.
5. While inserting new records, the template should be blank. If you have a few Customers in your system, you can select Export Type as "5 Records" to see the format in which you have to enter the data in the template.
6. Select the File Type of the export template.
7. Select the fields that you want to fill in as the Customer details.
8. Click on **Export**.

E

Search or type a command (Ctrl + G)

Q

Settings

Help

MODULES

Home

Accounting

Assets

Buying

CRM

HR

Loan

Projects

Quality

Selling

Stock

Support

Website

Settings

ADMINISTRATION

Customization

Integrations

YOUR SHORTCUTS

Item

Customer

Supplier

Sales Invoice

Dashboard

Leaderboard

REPORTS & MASTERS

Agriculture

Location

Stock

Warehouse

Brand

Unit of Measure (UOM)

Stock Reconciliation

Human Resources

Employee

Employee Attendance Tool

Salary Structure

CRM

Lead

Customer Group

Territory

Accounting

Item

Customer

Supplier

Company

Chart of Accounts

Opening Invoice Creation Tool

Data Import and Settings

Import Data

Chart of Accounts Importer

Letter Head

Email Account

Important

No Records Created

Customize Workspace


## 1.2 Entering Data in the Template

Your downloaded template will look something like this:

| Customer |           |      |                |           |
|----------|-----------|------|----------------|-----------|
| ID       | Full Name | Type | Customer Group | Territory |
|          |           |      |                |           |

Open the downloaded template in a spreadsheet application (like Excel, Numbers, or Libre Office) and enter the data below the column headings shown as follows:

P.O.Box 128448, Dubai, United Arab Emirates  
man.energy



- 24 -

مسان للطاقة  
MAN ENERGY

## Customer

| ID | Full Name                     | Type       | Customer Group | Territory         |
|----|-------------------------------|------------|----------------|-------------------|
|    | Schulist-Ferry                | Company    | Government     | Rest of The World |
|    | Baumbach-Bayer                | Company    | Commercial     | India             |
|    | Kuhic, Batz and Labadie       | Company    |                |                   |
|    | Schimmel LLC                  | Company    | Commercial     | Rest of The World |
|    | Hoeger, Sanford and Kozey     | Company    | Government     |                   |
|    | Stokes-Towne                  | Company    | Commercial     |                   |
|    | Reilly LLC                    | Company    | Government     |                   |
|    | Wyman, Schmeler and Wilkinson | Company    | Commercial     | Rest of The World |
|    | Weimann, Reinger and Schmidt  | Company    | Government     | Rest of The World |
|    | Cassin-Schultz                | Company    | Commercial     |                   |
|    | Biddie Butson                 | Individual | Individual     | India             |
|    | Esdras McGrady                | Individual | Individual     |                   |
|    | Titus Palombi                 | Individual |                | Rest of The World |
|    | Philippe Rodman               | Individual | Individual     |                   |
|    | Charline Larmouth             | Individual | Individual     |                   |
|    | Gwyn Tatersale                | Individual | Individual     |                   |
|    | Sharon Spadeck                | Individual | Individual     | Rest of The World |
|    | Brook Ganing                  | Individual | Individual     | India             |
|    | Rickard Gosney                | Individual | Individual     |                   |
|    | Marita Grisenthwaite          | Individual | Individual     | India             |

Now, save your template as an Excel or Comma Separated Values (CSV) file.

You can leave the ID column as blank while inserting new records.

When you import this template, each row will make a Customer record in the system.

### 1.3 Importing the Template

1. After updating your template file, go back to the Data Import form and attach the file by clicking on the **Attach** button.
2. Select the template file and click on **Upload**.
3. After the upload is successful, click on **Start Import**.

E

Settings > Data Import

Search or type a command (Ctrl + G)

Settings Help

Customer Import on 2020-06-18 16:34:36.... Pending

Document Type

Customer

Import Type

Insert New Records

Download Template

Import File

Attach

OR


Import from Google Sheets

Must be a publicly accessible Google Sheets URL

Upload

Close Upload

☐ Make all attachments private



Customer.csv

969

Save

If there are any errors in your template, they will be shown in the Warnings section. The warnings will be categorized by Row or Column with their number so that you can easily track them down in the template and resolve them. You must resolve all the warnings before you can import the data.

E

Settings > Data Import

Search or type a command (Ctrl + G)

Settings Help

Customer Import on 2020-06-18 16:34:36.... Pending

ROW 4

- Full Name is a mandatory field

ROW 7

- Full Name is a mandatory field

ROW 8

- Type: Value must be one of Company, Individual

ROW 12

- Type: Value must be one of Company, Individual

PREVIEW

Map Columns

| Sr. No | ID | Full Name                | Type    | Customer Group | Territory         |
|--------|----|--------------------------|---------|----------------|-------------------|
| 2      |    | Schulist-Ferry           | Company | Government     | Rest of The World |
| 3      |    | Baumbach-Bayer           | Company | Commercial     | India             |
| 4      |    |                          | Company |                |                   |
| 5      |    | Schimmel LLC             | Company | Commercial     | Rest of The World |
| 6      |    | Heeger Sanford and Kazan | Company | Government     |                   |

After you have resolved the warnings, click on **Start Import** again to import the data. On successful import of the data, you'll see a log of each record that was created in the Import Log section.

## Customer Import on 2020-06-18 16:34:36.... ● Success

☐ Show Failed Logs

| Row Number | Status    | Message   |
|------------|-----------|---|
| 2          | ● Success | Successfully imported <a href="#">Schulist-Ferry - 1</a>                |
| 3          | ● Success | Successfully imported <a href="#">Baumbach-Bayer - 1</a>                |
| 4          | ● Success | Successfully imported <a href="#">Schimmel LLC - 1</a>                  |
| 5          | ● Success | Successfully imported <a href="#">Hoeger, Sanford and Kozey - 1</a>     |
| 6          | ● Success | Successfully imported <a href="#">Reilly LLC - 1</a>                    |
| 7          | ● Success | Successfully imported <a href="#">Wyman, Schmeler and Wilkinson - 1</a> |
| 8          | ● Success | Successfully imported <a href="#">Weimann, Reinger and Schmidt - 1</a>  |
| 9          | ● Success | Successfully imported <a href="#">Cassin-Schultz - 1</a>                |
| 10         | ● Success | Successfully imported <a href="#">Biddie Butson</a>                     |
| 11         | ● Success | Successfully imported <a href="#">Esdras McGrady</a>                    |
| 12         | ● Success | Successfully imported <a href="#">Titus Palombi</a>                     |
| 13         | ● Success | Successfully imported <a href="#">Philippe Rodman</a>                   |
| 14         | ● Success | Successfully imported <a href="#">Charline Larmouth</a>                 |
| 15         | ● Success | Successfully imported <a href="#">Gwyn Tatersale</a>                    |
| 16         | ● Success | Successfully imported <a href="#">Sharon Spadeck</a>                    |
| 17         | ● Success | Successfully imported <a href="#">Brook Ganing</a>                      |

## 2. Updating Existing Records

Let's say you want to update Customer data in bulk in your system. The first step is to download the template with the data.

### 2.1 Download the Template

1. Go to Customer List, click on Menu > Import. Click on **New**.
2. Select Import Type as Update Existing Records
3. Click on **Save**.
4. Now, click on **Download Template**.
5. While updating existing records, you must export the records from the system with the ID field and the fields that you want to update. You can choose All Records or Filtered Records depending on your case.
6. Select the fields that you want to update for the Customer records.
7. Click on **Export**.

### 2.2 Updating Data in the Template

Your downloaded template will look something like this:



## Customer

| ID                                   | Full Name                     | Type       | Customer Group      | Territory         |
|--------------------------------------|-------------------------------|------------|---------------------|-------------------|
| <b>Marita Grisenthwaite</b>          | Marita Grisenthwaite          | Individual | Individual          | India             |
| <b>Rickard Gosney</b>                | Rickard Gosney                | Individual | Individual          | All Territories   |
| <b>Brook Ganing</b>                  | Brook Ganing                  | Individual | Individual          | India             |
| <b>Sharon Spadeck</b>                | Sharon Spadeck                | Individual | Individual          | Rest Of The World |
| <b>Gwyn Tatersale</b>                | Gwyn Tatersale                | Individual | Individual          | All Territories   |
| <b>Charline Larmouth</b>             | Charline Larmouth             | Individual | Individual          | All Territories   |
| <b>Philippe Rodman</b>               | Philippe Rodman               | Individual | Individual          | All Territories   |
| <b>Titus Palombi</b>                 | Titus Palombi                 | Individual | All Customer Groups | Rest Of The World |
| <b>Esdras McGrady</b>                | Esdras McGrady                | Individual | Individual          | All Territories   |
| <b>Biddie Butson</b>                 | Biddie Butson                 | Individual | Individual          | India             |
| <b>Cassin-Schultz</b>                | Cassin-Schultz                | Company    | All Customer Groups | All Territories   |
| <b>Weimann, Reinger and Schmidt</b>  | Weimann, Reinger and Schmidt  | Company    | All Customer Groups | All Territories   |
| <b>Wyman, Schmeler and Wilkinson</b> | Wyman, Schmeler and Wilkinson | Company    | All Customer Groups | All Territories   |
| <b>Reilly LLC</b>                    | Reilly LLC                    | Company    | All Customer Groups | All Territories   |
| <b>Stokes-Towne</b>                  | Stokes-Towne                  | Company    | All Customer Groups | All Territories   |
| <b>Hoeger, Sanford and Kozey</b>     | Hoeger, Sanford and Kozey     | Company    | All Customer Groups | All Territories   |
| <b>Schimmel LLC</b>                  | Schimmel LLC                  | Company    | All Customer Groups | All Territories   |
| <b>Kuhic, Batz and Labadie</b>       | Kuhic, Batz and Labadie       | Company    | All Customer Groups | All Territories   |
| <b>Baumbach-Bayer</b>                | Baumbach-Bayer                | Company    | All Customer Groups | All Territories   |
| <b>Schulist-Ferry</b>                | Schulist-Ferry                | Company    | All Customer Groups | All Territories   |

Now, change the values in your template and save the file as Excel or CSV.

While exporting records for updating them, ensure that the ID column is exported and is untouched. The values in the ID column are used to identify the records in the system. You can update the values in other columns but not in the ID column. If you remove some child table row, the system will consider that the row is supposed to be deleted.

### 2.3 Importing the Template

Follow the steps in [Importing the Template](#) section above.

### 3. Importing Child Records

Data in ERP is stored in tables like a spreadsheet with columns and rows of data. Each form like Sales Order has multiple fields like Customer, Company, etc. It also has tables like the item table, tax table, etc. In Data Import, the set of fields in the Sales Order are treated as the main table and the rows inside the child table (item table) are treated as the child table for data import.

Each form in ERP can have multiple child tables associated with it. The child tables are linked to the parent tables and are implemented where there are multiple values for any property. For example, an Item can have multiple prices, a Sales Invoice has multiple Items, Taxes, and so on. When you export a document with child tables, for e.g., each child row will appear on a separate row but it is associated with a single parent row. The subsequent values in the parent columns will remain blank. You must ensure that this order is not broken when you are importing them via Data Import.

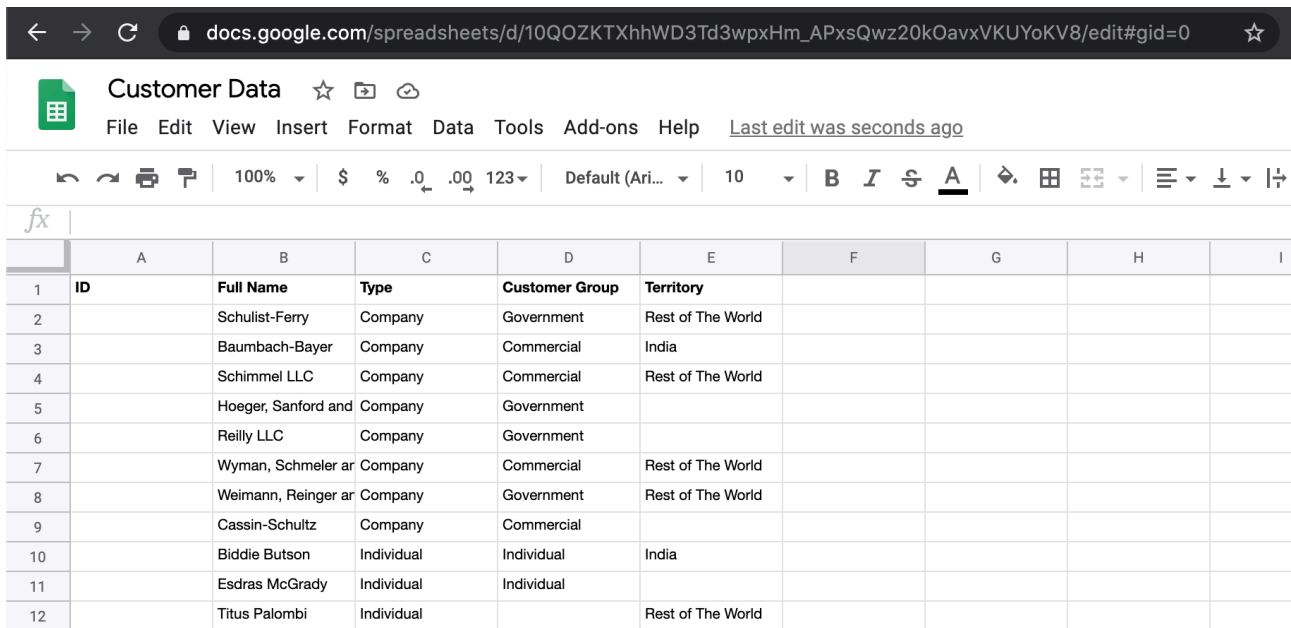
#### Quotation

| ID                 | Series          | Quotation To | Company     | Date       | Price List | ID (Items) | Item Code (Items) | Item Name (Items) | Description (Items) | Quantity (Items) | UOM (Items) |
|--------------------|-----------------|--------------|-------------|------------|------------|------------|-------------------|-------------------|---------------------|------------------|-------------|
| SAL-QTN-2020-00001 | SAL-QTN-.YYYY.- | Customer     | Tennis Mart | 2020-06-18 | Standard   | 415bed37e0 | Tennis Ball       | Tennis Ball       | Tennis Ball         | 1.0              | Unit        |
|                    |                 |              |             |            |            | df437bdf4  | Tennis Racquet    | Tennis Racquet    | Tennis Racquet      | 1.0              | Unit        |

## 4. Import Options

### 4.1 Import from Google Sheets

You can also import data from Google Sheets. Import your template in Google Sheets and enter the data. Make sure the Google Sheet is public. You can test this by opening the Google Sheets URL in an incognito browser window.



The screenshot shows a Google Sheet titled "Customer Data" with the following data:

| ID | Full Name           | Type       | Customer Group | Territory         |
|----|---------------------|------------|----------------|-------------------|
| 1  | Schulist-Ferry      | Company    | Government     | Rest of The World |
| 2  | Baumbach-Bayer      | Company    | Commercial     | India             |
| 3  | Schimmel LLC        | Company    | Commercial     | Rest of The World |
| 4  | Hoeger, Sanford and | Company    | Government     |                   |
| 5  | Reilly LLC          | Company    | Government     |                   |
| 6  | Wyman, Schmeler ar  | Company    | Commercial     | Rest of The World |
| 7  | Weimann, Reinger ar | Company    | Government     | Rest of The World |
| 8  | Cassin-Schultz      | Company    | Commercial     |                   |
| 9  | Biddie Butson       | Individual | Individual     | India             |
| 10 | Esdras McGrady      | Individual | Individual     |                   |
| 11 | Titus Palombi       | Individual |                | Rest of The World |
| 12 |                     |            |                |                   |

## Customer Import on 2020-06-18 17:25:33.... Pending

[Start Import](#)

Import from Google Sheets

[https://docs.google.com/spreadsheets/d/10QOZKTXhhWD3Td3wpXHm\\_APxs/](https://docs.google.com/spreadsheets/d/10QOZKTXhhWD3Td3wpXHm_APxs/)

Must be a publicly accessible Google Sheets URL

[Refresh Google Sheet](#)

PREVIEW

[Map Columns](#)

| Sr. No | ID | Full Name                     | Type       | Customer Group | Territory         |
|--------|----|-------------------------------|------------|----------------|-------------------|
| 2      |    | Schulist-Ferry                | Company    | Government     | Rest of The World |
| 3      |    | Baumbach-Bayer                | Company    | Commercial     | India             |
| 4      |    | Schimmel LLC                  | Company    | Commercial     | Rest of The World |
| 5      |    | Hoeger, Sanford and Kozey     | Company    | Government     |                   |
| 6      |    | Reilly LLC                    | Company    | Government     |                   |
| 7      |    | Wyman, Schmeler and Wilkin... | Company    | Commercial     | Rest of The World |
| 8      |    | Weimann, Reinger and Schmi... | Company    | Government     | Rest of The World |
| 9      |    | Cassin-Schultz                | Company    | Commercial     |                   |
| 10     |    | Biddie Butson                 | Individual | Individual     | India             |
| 11     |    | Esdras McGrady                | Individual | Individual     |                   |

Showing only first 10 rows out of 18

### 4.2 Submit After Import

In ERP document types are mainly of two types - masters and transactions. The masters are records like Customer and Task which can only be saved not submitted. Transactions like Sales Orders, Purchase Invoices are submittable documents and can be submitted.

When you select a submittable document type for Import, you can tick **Submit After Import** to submit the document after it is imported.

### 4.3 Don't Send Emails

Let's say you have created a [Notification](#) in your system and whenever a Lead is created an email is sent. Now, if you are bulk importing Leads then a lot of emails will be sent, which may not be desired. You can disable this option to avoid sending emails.

## 5. Additional Notes

### 5.1 Upload Limit

There is no hard limit on the number of records that can be imported. But you must try and upload only a few thousand records at a time. Importing a large number of records (let's say 50,000) might slow down the system considerably for the users that are using the system.

### 5.2 CSV Files

A CSV (Comma Separated Value) file is a data file that you can upload into ERP to update various data. Any spreadsheet file from popular spreadsheet applications like MS Excel or Open Office Spreadsheet can be saved as a CSV file.

If you are using Microsoft Excel and using non-English characters, make sure to save your file encoded as UTF-8.

For older versions of Excel, there is no clear way of saving as UTF-8. So save your file as CSV, then open it in Notepad, then save as "UTF-8". (Or upgrade your Excel!)

## > Data Export

**Data Export lets you export data from DocTypes to a CSV or an Excel format.**

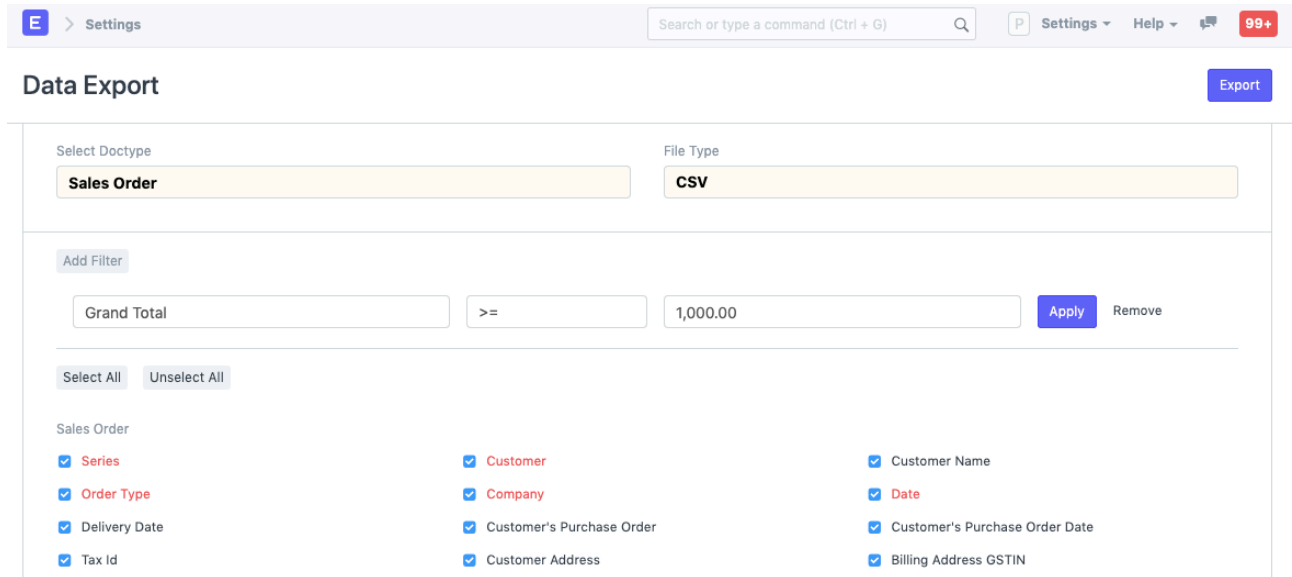
After exporting data, you can use the same file to import data using [Data Import](#).

To access Data Export, go to:

Home > Settings > Data Export

## 1. How to Use Data Export

1. Go to the Data Export DocType.
2. Select the DocType whose data you want to export.
3. Select the file format whether CSV or Excel.
4. Select the fields to export, the red ones are mandatory.
5. You can also add filters to select only specific data, for example, Grand Total >= 1,000 for Sales Orders.
6. Click on Export to download the file.



The screenshot shows the 'Data Export' interface. At the top, there's a navigation bar with 'E' and 'Settings'. Below it, a search bar says 'Search or type a command (Ctrl + G)'. The main header is 'Data Export' with an 'Export' button on the right. The interface is divided into two main sections: 'Select DocType' and 'File Type'. Under 'Select DocType', 'Sales Order' is selected. Under 'File Type', 'CSV' is selected. Below these, there's an 'Add Filter' section with a filter rule: 'Grand Total' >= '1,000.00'. There are 'Apply' and 'Remove' buttons for the filter. At the bottom, there's a 'Select All' and 'Unselect All' section. Under 'Sales Order', there are three columns of fields with checkboxes: 
 

- Column 1: **Series** (red), **Order Type** (red), Delivery Date, Tax Id.
- Column 2: **Customer** (red), **Company** (red), Customer's Purchase Order, Customer Address.
- Column 3: **Customer Name** (red), **Date** (red), Customer's Purchase Order Date, Billing Address GSTIN.

## ➤ Chart Of Accounts Importer

When a new company is created in ERP, the Chart of Accounts for it is created by default with a pre-set structure. However, if you have your own Chart of Accounts, you can import it using the Chart of Accounts Importer.

It allows you to create your own Chart of Accounts according to your requirement and import it into the system.

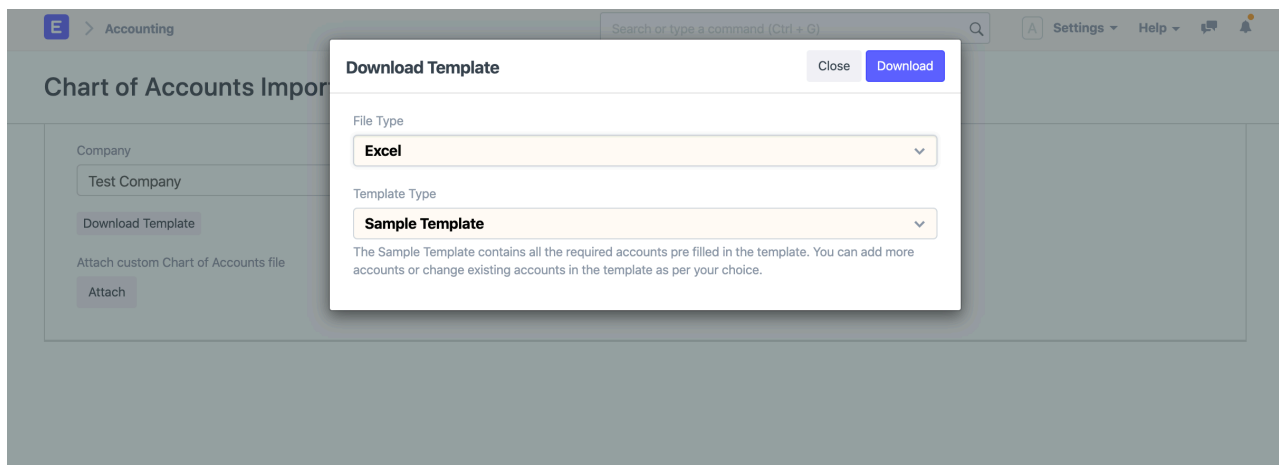
Any existing Chart Of Accounts against that company will be overwritten. Make sure the company you are selecting doesn't have any pre-existing transactions otherwise you'll receive a validation error.

To access, go to:

Home > Getting Started > Chart of Accounts Importer

## 1. How to import Chart Of Accounts

1. Select the Company for which you want to import the Chart of Accounts.
2. Click on "Download Template" button to download the template. Select file type in which you want to download the template. Select the template type and click on "Download". "Sample Template" contains pre-filled sample data so that you get an idea of how to fill the template. You can edit the data in "Sample Template" itself or download "Blank Template" for a fresh template.



| Account Name | Parent Account | Account Number | Is Group | Account Type       | Root Type |
|--------------|----------------|----------------|----------|--------------------|-----------|
|              |                |                | 1        |                    | Asset     |
|              |                |                | 1        |                    | Liability |
|              |                |                | 1        |                    | Expense   |
|              |                |                | 1        |                    | Income    |
|              |                |                | 1        |                    | Equity    |
|              |                |                | 1        | Bank               | Asset     |
|              |                |                | 1        | Cash               | Asset     |
|              |                |                | 1        | Stock              | Asset     |
|              |                |                | 0        | Cost of Goods Sold | Expense   |
|              |                |                | 0        | Depreciation       | Expense   |
|              |                |                | 0        | Fixed Asset        | Asset     |
|              |                |                | 0        | Payable            | Liability |
|              |                |                | 0        | Receivable         | Asset     |
|              |                |                | 0        | Stock Adjustment   | Expense   |
|              |                |                | 0        | Bank               | Asset     |
|              |                |                | 0        | Cash               | Asset     |
|              |                |                | 0        | Stock              | Asset     |

3. Once you download the template, fill in the details in the template as shown in the sample template below. Please make sure to make accounts for account types "Cost of Goods Sold", "Depreciation", "Fixed Asset", "Payable", "Receivable", "Stock Adjustment". Root types for these accounts must be one of Asset, Liability, Income, Expense, and Equity.

To know more about "Account Types" and "Root Types" click here [click here](#)

| Account Name                  | Parent Account                | Account Number | Is Group | Account Type       | Root Type |
|-------------------------------|-------------------------------|----------------|----------|--------------------|-----------|
| Application Of Funds(Assets)  |                               |                | 1        |                    | Asset     |
| Sources Of Funds(Liabilities) |                               |                | 1        |                    | Liability |
| Equity                        |                               |                | 1        |                    | Equity    |
| Expenses                      |                               |                | 1        |                    | Expense   |
| Income                        |                               |                | 1        |                    | Income    |
| Bank Accounts                 | Application Of Funds(Assets)  |                | 1        | Bank               | Asset     |
| Cash In Hand                  | Application Of Funds(Assets)  |                | 1        | Cash               | Asset     |
| Stock Assets                  | Application Of Funds(Assets)  |                | 1        | Stock              | Asset     |
| Cost Of Goods Sold            | Expenses                      |                | 0        | Cost of Goods Sold | Expense   |
| Asset Depreciation            | Expenses                      |                | 0        | Depreciation       | Expense   |
| Fixed Assets                  | Application Of Funds(Assets)  |                | 0        | Fixed Asset        | Asset     |
| Accounts Payable              | Sources Of Funds(Liabilities) |                | 0        | Payable            | Liability |
| Accounts Receivable           | Application Of Funds(Assets)  |                | 1        | Receivable         | Asset     |
| Stock Expenses                | Expenses                      |                | 0        | Stock Adjustment   | Expense   |
| Sample Bank                   | Bank Accounts                 |                | 0        | Bank               | Asset     |
| Cash                          | Cash In Hand                  |                | 0        | Cash               | Asset     |
| Stores                        | Stock Assets                  |                | 0        | Stock              | Asset     |

4. Click on "Attach" to upload the template.

## Chart of Accounts Importer

Company

Test Company

Download Template

Attach custom Chart of Accounts file

Attach

- Once you upload the template you'll be able to see the preview of the Chart of Accounts in the Chart Preview section.

## Chart of Accounts Importer

Import

Company

Test Company

Download Template

Attach custom Chart of Accounts file

/private/files/coa\_importer\_template (13).xlsx

Reload File

Clear

CHART PREVIEW

- All Accounts
  - Application Of Funds(Assets)
    - Bank Accounts
    - Cash In Hand
    - Stock Assets
    - Fixed Assets
    - Accounts Receivable
  - Sources Of Funds(Liabilities)
    - Accounts Payable
  - Equity
  - Expenses
    - Cost Of Goods Sold
    - Asset Depreciation
    - Stock Expenses
  - Income

- If everything seems correct in the preview, click on "Import" in the top right corner and the accounts will be created.

## Chart of Accounts Importer

Import

Company

Test Company

Download Template

Attach custom Chart of Accounts file

/private/files/coa\_importer\_template (13).xlsx

Reload File

Clear

CHART PREVIEW

- To verify the created accounts, you can go to Chart of Accounts and see the newly created accounts for that company.

## Chart Of Accounts

Menu New

Expand All View Create Financial Statements

Test Company

|                                    |           |
|------------------------------------|-----------|
| Test Company                       |           |
| Application Of Funds(Assets) - TC  | ₹ 0.00 Cr |
| Accounts Receivable - TC           | ₹ 0.00 Cr |
| Bank Accounts - TC                 | ₹ 0.00 Cr |
| Cash In Hand - TC                  | ₹ 0.00 Cr |
| Cash - TC                          | ₹ 0.00 Cr |
| Fixed Assets - TC                  | ₹ 0.00 Cr |
| Stock Assets - TC                  | ₹ 0.00 Cr |
| Sources Of Funds(Liabilities) - TC | ₹ 0.00 Cr |
| Equity - TC                        | ₹ 0.00 Cr |
| Income - TC                        | ₹ 0.00 Cr |
| Expenses - TC                      | ₹ 0.00 Cr |
| Asset Depreciation - TC            | ₹ 0.00 Cr |
| Cost Of Goods Sold - TC            | ₹ 0.00 Cr |
| Stock Expenses - TC                | ₹ 0.00 Cr |

### ➤ Downloading Backups

In the ERP, you can manually download database backup. To get the latest database backup, go to:

Home > Settings > Download Backups

Backup available for the download is updated in every eight hours. Click on the link to download the backup at a given time.

## Download Backups

Set Number of Backups Download Files Backup

| Date             | File  | Size |
|------------------|---|------|
| 2019-07-04 18:00 | /backups/20190704_180006-frappe_local-database.sql.gz | 0.1K |
| 2019-07-04 12:03 | /backups/20190704_120343-frappe_local-database.sql.gz | 0.1K |
| 2019-07-03 18:00 | /backups/20190703_180006-frappe_local-database.sql.gz | 0.1K |

By default three latest backups will be available for the download. To change this, click on "Set Number of Backups". This will take you to System Settings where you can set Number of Backups available for download at a time.

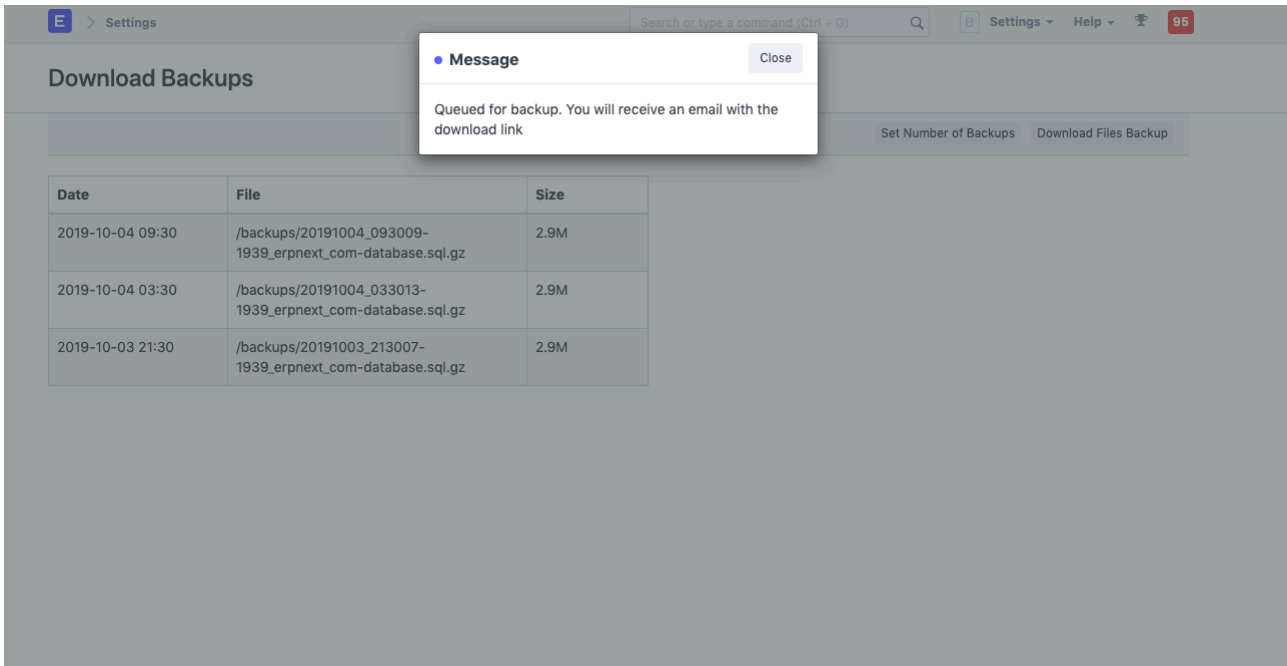
## System Settings

Menu Save

|             |   |
|-------------|---|
| +           | BACKUPS ^                                   |
| Shared With | Number of Backups                           |
| +           | 3   |
| ♥           | Older backups will be automatically deleted |

### ➤ Downloading Files Backup

Clicking on Download Files Backup will send an email with links to the backup for both private and public files. [Email](#) must be configured for this to work.



| Date             | File  | Size |
|------------------|---|------|
| 2019-10-04 09:30 | /backups/20191004_093009-1939_erpnext_com-database.sql.gz | 2.9M |
| 2019-10-04 03:30 | /backups/20191004_033013-1939_erpnext_com-database.sql.gz | 2.9M |
| 2019-10-03 21:30 | /backups/20191003_213007-1939_erpnext_com-database.sql.gz | 2.9M |

#### Automating Backups to Cloud Storage

You can also automate your backups to be uploaded directly on a cloud storage platform. Currently, ERP supports:

1. Amazon S3
2. Dropbox
3. Google Drive



## USERS AND PERMISSIONS

### ➤ Adding Users

Users can be added by the System Manager. To add users go to:

Home > Users and Permissions > User

There are two main types of users:

**Website users:** Customers, Suppliers, Students, etc., who have access only to the portal and not to any modules. **System Users:** People using ERP in the Company with access to modules, company data, etc.

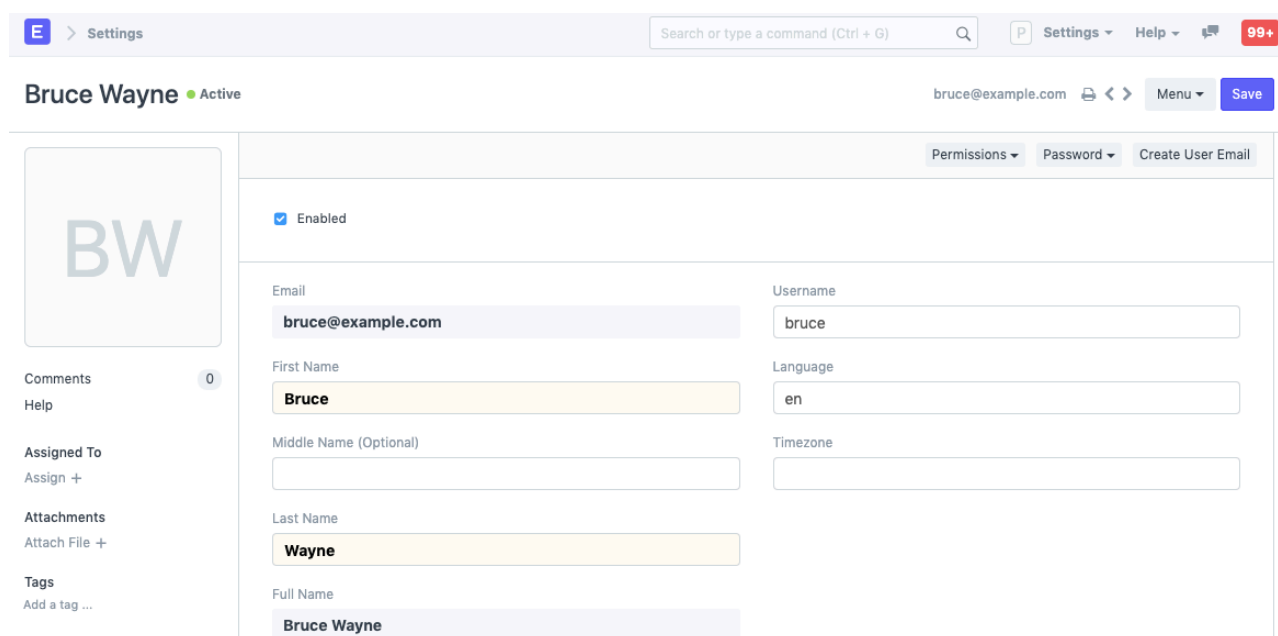
Read more about [difference between system and website user](#).

Under User, a lot of info can be entered. For the sake of usability, the information entered for web users is minimal: First Name and Email.

An Email address is the unique key (ID) identifying the Users.

#### 1. How to Create a New User

1. Go to the User list, click on New.
2. Add an Email address and name of the user.
3. Save.



The screenshot shows the 'Add User' form in the MAN Energy Services system. The user is named 'Bruce Wayne' and is currently 'Active'. The form includes fields for Email (bruce@example.com), Username (bruce), First Name (Bruce), Last Name (Wayne), and Full Name (Bruce Wayne). There are also fields for Language (en) and Timezone. The user is marked as 'Enabled'. The interface includes a sidebar with options like Comments, Help, Assigned To, Attachments, and Tags. The top navigation bar shows 'Settings' and a search bar.

Details like Username and Language can also be changed.

#### 2. Features

##### 2.1 Setting Roles

After saving, you will see a list of roles and checkboxes next to them. Just check the roles you want the user to have and save the document.

The roles have pre-defined permissions, to know more about roles, [click here](#). You can set [Role profiles](#) to use as a template which selects multiple roles together.

E

> Settings

Search or type a command (Ctrl + G)

Q

P

Settings

Help

99+

Bruce Wayne

Not Saved

bruce@example.com

Menu

Save

Shared With

B +

You edited this

3 minutes ago

You created this

3 minutes ago

ROLES

Role Profile

All

Accounts Manager

Analytics

Blogger

Employee

Fleet Manager

HR Manager

Item Manager

Knowledge Base Editor

LMS User

Maintenance User

Manufacturing User

Non Profit Manager

Accounts User

Auditor

Customer

Expense Approver

Fulfillment User

HR User

Knowledge Base Contributor

Leave Approver

Maintenance Manager

Manufacturing Manager

Newsletter Manager

Non Profit Member

## 2.2 More Information

More information about the employee can be set from this section:

- Gender
- Phone
- Mobile No
- Birth Date
- Location
- Interests
- Bio
- Banner Image

Ticking on 'Mute Sounds' will mute sounds that play on interacting with documents. The user may need to do a Settings > Reload for the changes to take place.

## 2.3 Change Password

- Set New Password:** As a System Manager, you can set a new password for the user if it needs to be changed.
- Send Password Update Notification:** Send an email notification to the user that their password has been changed.
- Log out from all devices while changing Password:** When changing the user's password, this logs out the user from PC and any mobile device they may have logged into.

## 2.4 Document Follow

With this option you can follow various documents in the system and get email notifications when they are updated. Know more [here](#).

## 2.5 Email Settings

- Send Notifications for Email threads:** The user will get notifications for Email conversations that take place in document types like Opportunities.
- Send Me A Copy of Outgoing Emails:** Sends the user a copy of the emails they send. This is useful for keeping track if the email got sent.
- Allowed In Mentions:** Allow this user's name to appear in thread conversations so that they can be mentioned using '@'.
- Email Signature:** Adding an email signature here will set it as default for all outgoing emails for the user. This is different from a footer which is set from the [Company master](#).

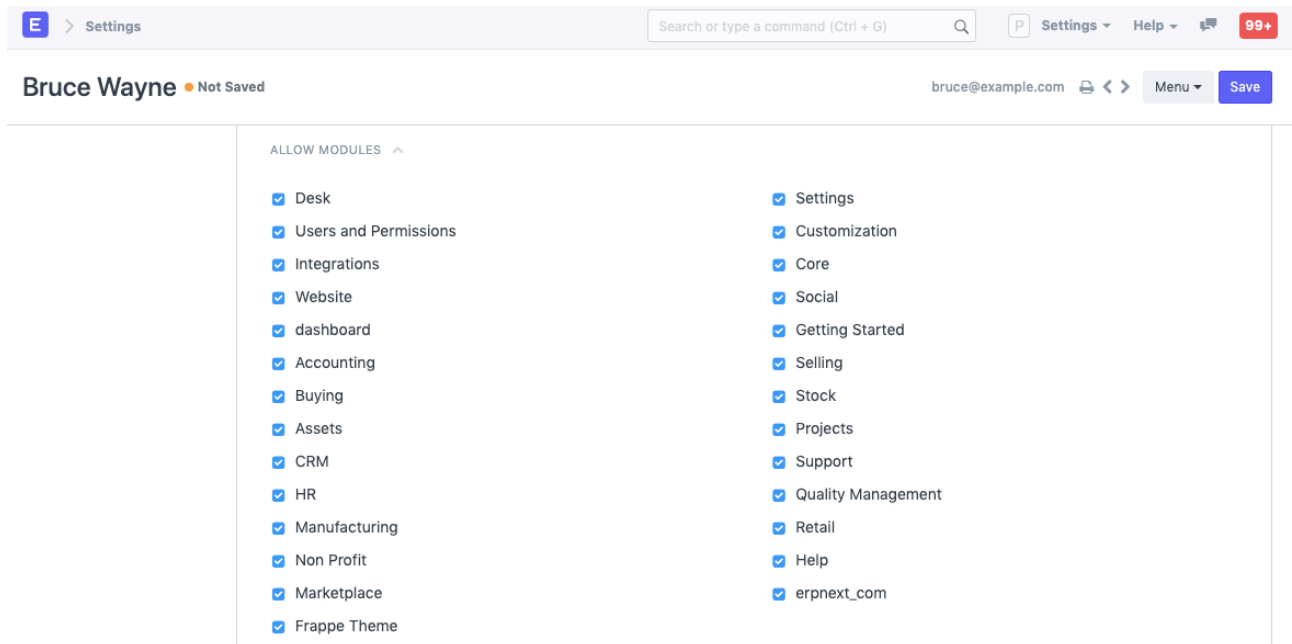
## 2.6 Email Inbox

Subscribe the user to different mailing lists of your company from this section. Add a new row and select the mailing list to assign this user.

For example, mailing lists can be jobs, support, sales, etc. To know more about Email Inbox, [click here](#).

## 2.7 Allow Module Access

Users will have access to all modules for which they have role-based access. If you want to restrict access of certain modules for this user, uncheck the modules from this list.

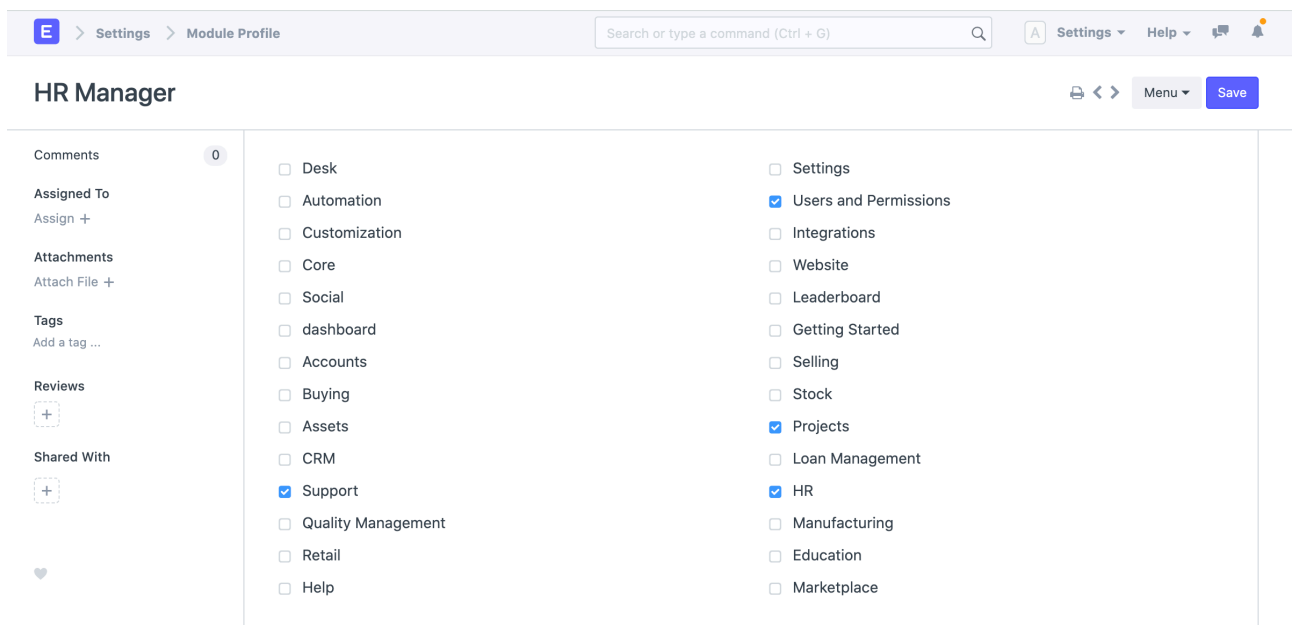


**ALLOW MODULES**

|   |  |
|---|--|
| <input checked="" type="checkbox"/> Desk                  | <input checked="" type="checkbox"/> Settings           |
| <input checked="" type="checkbox"/> Users and Permissions | <input checked="" type="checkbox"/> Customization      |
| <input checked="" type="checkbox"/> Integrations          | <input checked="" type="checkbox"/> Core               |
| <input checked="" type="checkbox"/> Website               | <input checked="" type="checkbox"/> Social             |
| <input checked="" type="checkbox"/> dashboard             | <input checked="" type="checkbox"/> Getting Started    |
| <input checked="" type="checkbox"/> Accounting            | <input checked="" type="checkbox"/> Selling            |
| <input checked="" type="checkbox"/> Buying                | <input checked="" type="checkbox"/> Stock              |
| <input checked="" type="checkbox"/> Assets                | <input checked="" type="checkbox"/> Projects           |
| <input checked="" type="checkbox"/> CRM                   | <input checked="" type="checkbox"/> Support            |
| <input checked="" type="checkbox"/> HR                    | <input checked="" type="checkbox"/> Quality Management |
| <input checked="" type="checkbox"/> Manufacturing         | <input checked="" type="checkbox"/> Retail             |
| <input checked="" type="checkbox"/> Non Profit            | <input checked="" type="checkbox"/> Help               |
| <input checked="" type="checkbox"/> Marketplace           | <input checked="" type="checkbox"/> erpnext_com        |
| <input checked="" type="checkbox"/> Frappe Theme          |  |

### 2.7.1 Module Profiles

Role Profiles act as a template to store and select access to multiple modules. This Role Profile can then be assigned to a User. For example, HR Users will have access to multiple modules like HR, Payroll, etc. Role Profiles are useful to provide access to multiple modules at once when adding multiple users.



**HR Manager**

|   |   |
|---|---|
| <input type="checkbox"/> Desk               | <input type="checkbox"/> Settings                         |
| <input type="checkbox"/> Automation         | <input checked="" type="checkbox"/> Users and Permissions |
| <input type="checkbox"/> Customization      | <input type="checkbox"/> Integrations                     |
| <input type="checkbox"/> Core               | <input type="checkbox"/> Website                          |
| <input type="checkbox"/> Social             | <input type="checkbox"/> Leaderboard                      |
| <input type="checkbox"/> dashboard          | <input type="checkbox"/> Getting Started                  |
| <input type="checkbox"/> Accounts           | <input type="checkbox"/> Selling                          |
| <input type="checkbox"/> Buying             | <input type="checkbox"/> Stock                            |
| <input type="checkbox"/> Assets             | <input checked="" type="checkbox"/> Projects              |
| <input type="checkbox"/> CRM                | <input type="checkbox"/> Loan Management                  |
| <input checked="" type="checkbox"/> Support | <input checked="" type="checkbox"/> HR                    |
| <input type="checkbox"/> Quality Management | <input type="checkbox"/> Manufacturing                    |
| <input type="checkbox"/> Retail             | <input type="checkbox"/> Education                        |
| <input type="checkbox"/> Help               | <input type="checkbox"/> Marketplace                      |

## 2.8 Security Settings

- **Simultaneous Sessions:** Simultaneous login sessions the user is allowed. You can use the same set of credentials for multiple users by allowing more sessions. This can be restricted from [System Settings](#) globally. For cloud account, the total number of simultaneous sessions cannot exceed the total number of subscribed users.
- **User Type:** If the user has any role checked other than Customer, Supplier, Patient, or Student they automatically become a System User. This field is read-only.

- **Login After, Login Before:** If you wish to give the user access to the system only between office hours, or during weekends, specify it here. For example, if office hours are from 10 am to 6 pm, set the Login After, Login Before hours as 10:00 and 18:00.
- **Restrict IP:** Restrict user login to the IPs specified here. This can be used so that the user can log in only from office computers. Multiple IPs can be added separated by commas.

This section also shows other details like Last Login, Last IP, and Last Active time for the user.

## 2.9 Third Party Authentication

This will allow users to use Facebook, Google, or GitHub to log in. To use this feature, signup for a developer account with Facebook, Google, GitHub, etc. Create an app on their console, specify an app name, the originating URL and callback URL, copy the client ID and client secret info here to start using.

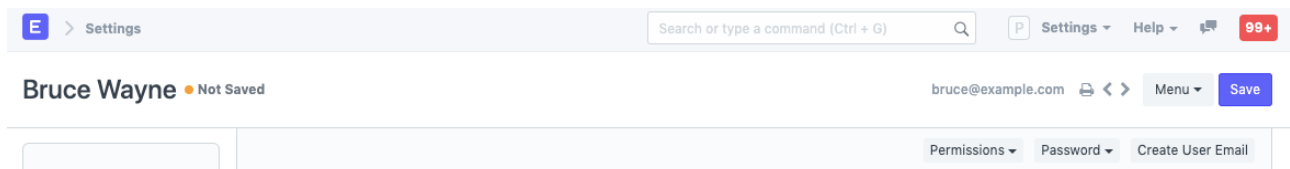
For more details, go to [this page](#).

## 2.10 API Access

You can generate API Secret keys from this section using the Generate Keys button. This can be used to access your account's data from another application, for example, an offline POS system.

## 2.11 After saving

After saving a user, these buttons will be seen on the dashboard area of the User master.



### Permissions

- **Set User Permissions:** Will take you to the [User Permissions](#) page of Bruce from where you can restrict Bruce's access to documents.
- **View Permitted Documents:** Will take you to the 'Permitted Documents For User' report for this user. Here you can see which documents does Bruce have access to. For example, on selected Sales Order, the list of Sales Orders Bruce has access to will be displayed.

### Password

- **Reset Password:** An email with instructions to reset the user's password will be sent to the user's [Email Account](#).
- **Reset OTP Secret:** Reset OTP Secret for logging in via Two Factor Authentication.

Create User Email will let you create an [Email Account](#) for the user based on the email entered in the User master.

## 3. Login Methods

In System Settings, under the Security section, if you check the 'Allow Login using Mobile No' checkbox, a mobile number can also be used to log in. While a Mobile No will be unique, it will not be treated as a user ID.

Login with Email:

● **Sign In**

**Sign in**

**Don't have an account? Sign up**

**Forgot Password?**

Login with Email or Mobile:

● Sign In

Email address or Mobile number

Password

Sign in

Don't have an account? [Sign up](#)

[Forgot Password?](#)

After adding these details, save the user.

#### ➤ Users And Permissions

In ERP, you can create multiple users and assign them different roles.

A role is a set of permissions assigned to a user so that they can access the documents they need to. For example, a sales employee will need access to sales transactions but will not have access to approve leaves.

Some users can only access the public-facing part of ERP (i.e. a portal view). Such users are called "Website Users". "System Users" will have access to modules and can access documents as per the roles set.

ERP implements permission control at the User and Role level. Each user in the system can be assigned multiple roles and permissions. The most important role is "System Manager". Any user having this role can add other users and set roles for all users.

#### ➤ Role and Role Profile

**A Role defines the permissions for accessing various documents in ERP.**

Roles define a set of permissions which can be set from the [Roles Permission Manager](#). Most commonly used roles are already defined in ERP, you can use the system with them. If needed, you can add more roles. For example, if you assign the Sales User role to a user, they'll be able to access documents like Quotations and Sales Orders since the permissions are already set for the role Sales User.

**Role profiles store different roles so that multiple roles can be assigned at once.**

Role Profiles act as a template to store and select multiple roles. This Role Profile can then be assigned to a [User](#). For example, a Sales Supervisor will have the roles Employee, Sales Manager, Sales User, and Sales Master Manager. Role Profiles are useful to assign multiple roles at once when adding multiple employees.

To access Role, go to:

Home > Users and Permissions > Role

### 1. How to add a Role

1. Go to the Role list, click on New.
2. Enter a name for the Role.
3. Choose whether the Role has desk access. A role that has desk access can access ERP modules and the company's documents. The level of access depends on the roles assigned to the user.
4. Save.

You can add two factor authentication for the role and also restrict it to a specific domain. From here, you can go to the [Roles Permission Manager](#) and set permissions for the role across different DocTypes.

E

Search or type a command (Ctrl + G)

P Settings Help 99+

### Role Permissions Manager

Set User Permissions

Select Document Type...

new role 1

| Document Type | Role   | Level | Permissions   |
|---------------|--|-------|---|
| Account       | new role 1<br><input type="checkbox"/> Only If Creator | 0     | <input checked="" type="checkbox"/> Read<br><input type="checkbox"/> Write<br><input type="checkbox"/> Create<br><input type="checkbox"/> Delete<br><input type="checkbox"/> Print<br><input type="checkbox"/> Email<br><input type="checkbox"/> Report<br><input type="checkbox"/> Import<br><input checked="" type="checkbox"/> Export<br><input type="checkbox"/> Set User Permissions<br><input type="checkbox"/> Share |

+ Add A New Rule

Restore Original Permissions

### 2. How to add a Role Profile

To access Role Profile, go to:

Home > Users and Permissions > Permissions > Role Profile

1. Go to the Role Profile list, click on New.
2. Enter a name.
3. Select the roles you want to assign to this profile.
4. Save.

E > Role Profile

Search or type a command (Ctrl + G)

P Settings Help 99+

### Sales Supervisor

Menu Save

☐ Purchase Master Manager  
☐ Quality Manager  
☒ Sales Manager  
☒ Sales User  
☐ Stock User  
☐ Supplier  
☐ System Manager  
☐ Website Manager

☐ Purchase User  
☐ Report Manager  
☒ Sales Master Manager  
☐ Stock Manager  
☐ Student  
☐ Support Team  
☐ Translator

>

Role Based Permissions

## Permission to different documents can be controlled using Role Based Permissions.

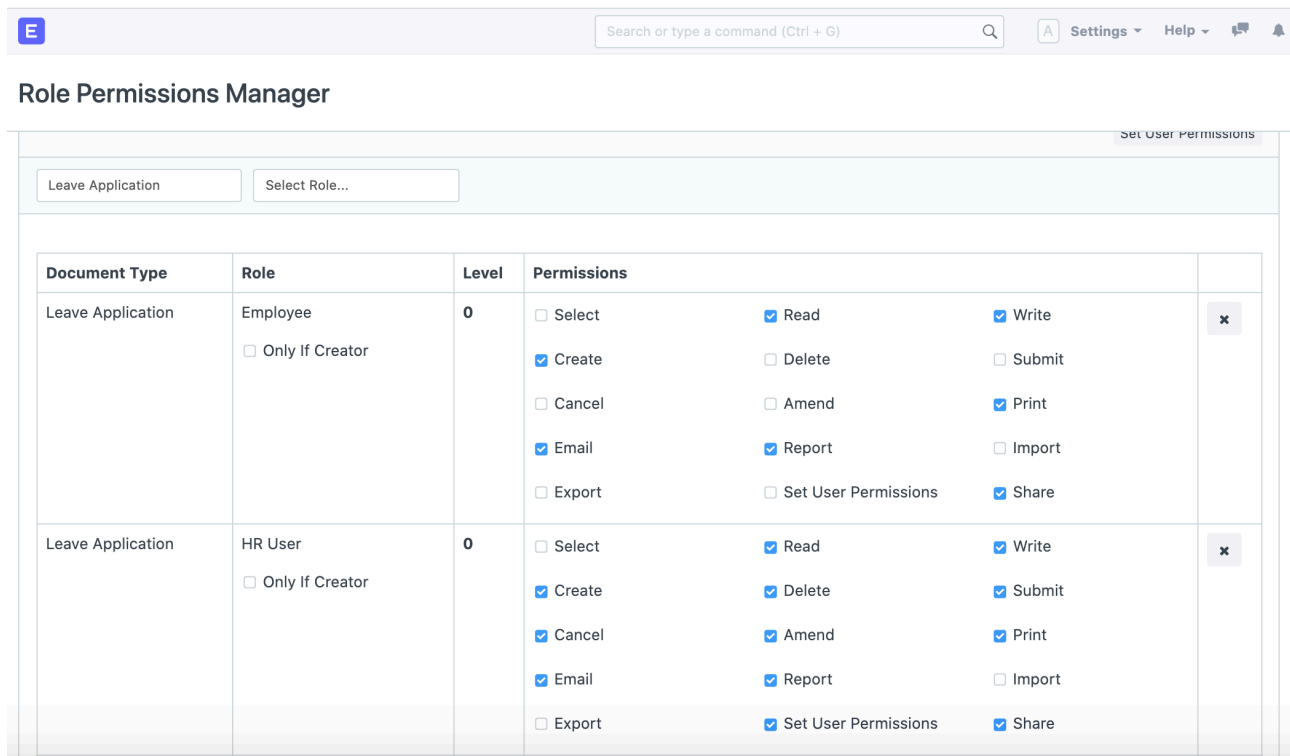
ERP has a role-based permission system. It means that you can assign Roles to Users, and Permissions can be set on Roles. The Role Permissions Manager allows you to set which roles can access which documents and with what permissions (read, write, submit, etc.).

Once roles are assigned to a user, their access can be limited to specific documents. The permission structure allows you to define different permission rules for different fields using a concept called **Permission Level** of a field.

### 1. How to use the Role Permissions Manager

To start using the Role Permission Manager, go to:

Home > Users and Permissions > Role Permissions Manager



| Document Type     | Role   | Level | Permissions  |
|-------------------|--|-------|--|
| Leave Application | Employee<br><input type="checkbox"/> Only If Creator | 0     | <input type="checkbox"/> Select<br><input checked="" type="checkbox"/> Create<br><input type="checkbox"/> Cancel<br><input checked="" type="checkbox"/> Email<br><input type="checkbox"/> Export<br><input checked="" type="checkbox"/> Read<br><input type="checkbox"/> Delete<br><input type="checkbox"/> Amend<br><input checked="" type="checkbox"/> Report<br><input type="checkbox"/> Set User Permissions<br><input checked="" type="checkbox"/> Write<br><input type="checkbox"/> Submit<br><input checked="" type="checkbox"/> Print<br><input type="checkbox"/> Import<br><input checked="" type="checkbox"/> Share  |
| Leave Application | HR User<br><input type="checkbox"/> Only If Creator  | 0     | <input type="checkbox"/> Select<br><input checked="" type="checkbox"/> Create<br><input checked="" type="checkbox"/> Cancel<br><input checked="" type="checkbox"/> Email<br><input type="checkbox"/> Export<br><input checked="" type="checkbox"/> Read<br><input checked="" type="checkbox"/> Delete<br><input checked="" type="checkbox"/> Amend<br><input checked="" type="checkbox"/> Report<br><input checked="" type="checkbox"/> Set User Permissions<br><input checked="" type="checkbox"/> Write<br><input checked="" type="checkbox"/> Submit<br><input checked="" type="checkbox"/> Print<br><input type="checkbox"/> Import<br><input checked="" type="checkbox"/> Share |

Permissions are applied on a combination of:

- **Roles:** As we saw earlier, Users are assigned Roles and it is on these Roles that permission rules are applied. For example, a sales user may be given the roles of an Employee and a Sales User.

Examples of Roles include Accounts Manager, Employee, HR User, etc.

- **Document Types:** Each type of document, master or transaction, has a separate list of role-based permissions as seen in the preceding screenshot.

Examples of Document Types are Sales Invoice, Leave Application, Stock Entry, etc.

- **Permission Levels:** In each document, you can group fields by "levels". Each group of fields is denoted by a unique number (0 to 9). A separate set of permission rules can be applied to each field group. By default, all fields are of level 0.

Permission "Level" connects fields with level X to a permission rule with level X. To know more click [here](#).

- **Document Stages:** Permissions are applied on each stage of the document like Creation, Saving, Submission, Cancellation, and Amendment. A role can be permitted to Print, Email, Import or Export data, access Reports, or define User Permissions.
- **User Permissions:** Using User Permissions in ERP a user can be restricted to access only specific Documents for that Document Type. Eg: Only one Territory from all Territories. User Permissions defined for other Document Types also get applied if they are related to the current Document Type through Link Fields.

For example, a Customer is a link field in a Sales Order or Quotation. In the Role Permissions Manager, User Permissions can be set using the 'Set User Permissions' button.

To set User Permissions based on documents/fields go to:



Home > Users and Permissions > Permissions > [User Permissions](#)

- **Add a New Rule:** In the Role Permissions Manager, to add a new rule, click on the **Add a New Rule** button and a pop-up box will ask you to select a Role and a Permission Level. Once you select this and click on 'Add', this will add a new row to your rules table.

## 2. How Role Based Permissions Work

Leave Application is a good example that encompasses all areas of a Permission System.

- It should be created by an Employee. For this, Employee Role should be given Read, Write, Create permissions.

| Document Type     | Role                                     | Level | Permissions                                |   |   |   |
|-------------------|--|-------|--|---|---|---|
| Leave Application | Employee                                 | 0     | <input type="checkbox"/> Select            | <input checked="" type="checkbox"/> Read      | <input checked="" type="checkbox"/> Write | ✕ |
|                   | <input type="checkbox"/> Only If Creator |       | <input checked="" type="checkbox"/> Create | <input type="checkbox"/> Delete               | <input type="checkbox"/> Submit           |   |
|                   |  |       | <input type="checkbox"/> Cancel            | <input type="checkbox"/> Amend                | <input checked="" type="checkbox"/> Print |   |
|                   |  |       | <input checked="" type="checkbox"/> Email  | <input checked="" type="checkbox"/> Report    | <input type="checkbox"/> Import           |   |
|                   |  |       | <input type="checkbox"/> Export            | <input type="checkbox"/> Set User Permissions | <input checked="" type="checkbox"/> Share |   |
|                   |  |       |  |   |   |   |

- An **Employee** should only be able to access his/her Leave Application. Hence, User Permissions record should be created for each User-Employee combination.

E

Settings > User Permission

Search or type a command (Ctrl + G)

Settings Help 99+

bruce@example.com

56e2037efd Menu Save

Comments 0

Assigned To Assign +

Attachments Attach File +

Tags Add a tag ...

Reviews +

Shared With +

View Permitted Documents

User

bruce@example.com

For Value

HR-EMP-00004

Allow

Employee

Is Default

ADVANCED CONTROL

Apply To All Document Types

Leave Type Employee

| Document Type | Role                                     | Level | Permissions                                |   |                                 |   |
|---------------|--|-------|--|---|---------------------------------|---|
| Leave Type    | Employee                                 | 0     | <input checked="" type="checkbox"/> Select | <input type="checkbox"/> Read                 | <input type="checkbox"/> Write  | ✕ |
|               | <input type="checkbox"/> Only If Creator |       | <input type="checkbox"/> Create            | <input type="checkbox"/> Delete               | <input type="checkbox"/> Print  |   |
|               |  |       | <input type="checkbox"/> Email             | <input type="checkbox"/> Report               | <input type="checkbox"/> Import |   |
|               |  |       | <input type="checkbox"/> Export            | <input type="checkbox"/> Set User Permissions | <input type="checkbox"/> Share  |   |
|               |  |       |  |   |                                 |   |
|               |  |       |  |   |                                 |   |

+ Add A New Rule

Restore Original Permissions

- **HR Manager** should be able to see all Leave Applications. Create a Permission Rule for HR Manager at Level 0, with Read permissions. Apply User Permissions should be disabled.

| Document Type     | Role   | Level | Permissions                                |  |  |   |
|-------------------|--|-------|--|--|--|---|
| Leave Application | HR Manager<br><input type="checkbox"/> Only If Creator | 0     | <input type="checkbox"/> Select            | <input checked="" type="checkbox"/> Read                 | <input checked="" type="checkbox"/> Write  | ✕ |
|                   |  |       | <input checked="" type="checkbox"/> Create | <input checked="" type="checkbox"/> Delete               | <input checked="" type="checkbox"/> Submit |   |
|                   |  |       | <input checked="" type="checkbox"/> Cancel | <input checked="" type="checkbox"/> Amend                | <input checked="" type="checkbox"/> Print  |   |
|                   |  |       | <input checked="" type="checkbox"/> Email  | <input checked="" type="checkbox"/> Report               | <input type="checkbox"/> Import            |   |
|                   |  |       | <input checked="" type="checkbox"/> Export | <input checked="" type="checkbox"/> Set User Permissions | <input checked="" type="checkbox"/> Share  |   |

- **Leave Approver** should be able to see and update Leave Applications of employees under him/her. Leave Approver is given Read and Write access at Level 0. Relevant Employee Documents should be enlisted in the User Permissions of Leave Approvers. (This effort is reduced for Leave Approvers mentioned in Employee Documents, by programmatically creating User Permission records).

|                   |  |   |  |   |  |   |
|-------------------|--|---|--|---|--|---|
| Leave Application | Leave Approver<br><input type="checkbox"/> Only If Creator | 0 | <input type="checkbox"/> Select            | <input checked="" type="checkbox"/> Read      | <input checked="" type="checkbox"/> Write  | ✕ |
|                   |  |   | <input type="checkbox"/> Create            | <input checked="" type="checkbox"/> Delete    | <input checked="" type="checkbox"/> Submit |   |
|                   |  |   | <input checked="" type="checkbox"/> Cancel | <input checked="" type="checkbox"/> Amend     | <input checked="" type="checkbox"/> Print  |   |
|                   |  |   | <input checked="" type="checkbox"/> Email  | <input checked="" type="checkbox"/> Report    | <input type="checkbox"/> Import            |   |
|                   |  |   | <input type="checkbox"/> Export            | <input type="checkbox"/> Set User Permissions | <input checked="" type="checkbox"/> Share  |   |

- It should be Approved/Rejected only by HR User or Leave Approver. The Status field of a Leave Application is set at Level 1. HR User and Leave Approver are given Read and Write permissions for Level 0, while everyone else (All) are given Read permission for Level 1.

E

Search or type a command (Ctrl + G)

Q

P Settings ▾ Help ▾ 99+

## Role Permissions Manager

|                   |                |   |  |   |   |
|-------------------|----------------|---|--|---|---|
| Leave Application | Leave Approver | 1 | <input checked="" type="checkbox"/> Read | <input checked="" type="checkbox"/> Write | ✕ |
| Leave Application | All            | 1 | <input checked="" type="checkbox"/> Read | <input type="checkbox"/> Write            | ✕ |
| Leave Application | HR User        | 1 | <input checked="" type="checkbox"/> Read | <input checked="" type="checkbox"/> Write | ✕ |

[+ Add A New Rule](#)
[Restore Original Permissions](#)

- **HR User** should be able to delegate Leave Applications to his/her subordinates. HR User is given the right to Set User Permissions. A User with HR User role would be able to define User Permissions on Leave Application for other users.

|                   |   |   |  |  |  |   |
|-------------------|---|---|--|--|--|---|
| Leave Application | HR User<br><input type="checkbox"/> Only If Creator | 0 | <input checked="" type="checkbox"/> Read                 | <input checked="" type="checkbox"/> Write  | <input checked="" type="checkbox"/> Create | ✕ |
|                   |   |   | <input checked="" type="checkbox"/> Delete               | <input checked="" type="checkbox"/> Submit | <input checked="" type="checkbox"/> Cancel |   |
|                   |   |   | <input checked="" type="checkbox"/> Amend                | <input checked="" type="checkbox"/> Print  | <input checked="" type="checkbox"/> Email  |   |
|                   |   |   | <input checked="" type="checkbox"/> Report               | <input type="checkbox"/> Import            | <input type="checkbox"/> Export            |   |
|                   |   |   | <input checked="" type="checkbox"/> Set User Permissions | <input checked="" type="checkbox"/> Share  |  |   |

In case you have correctly assigned the roles but still you're getting errors when accessing documents, refer [this page](#).

## ➤ User Permissions

**User permissions is a way of restricting user access to particular documents.**

Role based permissions allow setting complete (by default) access to a document type (doctype) like Sales Invoice, Orders, Quotation, etc. This means that when you assign a Sales User role to a user, they can access all the Sales Orders and Quotations.

User Permissions can be used to restrict access to select documents based on the link fields in the document. For example, consider that you do business with multiple territories and you want to restrict access of certain Sales Users to Quotations/Sales Order belonging to a particular territory. This can be done via User Permissions. The restrictions can be set on Customer, Supplier, Customer Group, Supplier Group, etc.

Setting User Permissions are particularly useful when you want to restrict based on:

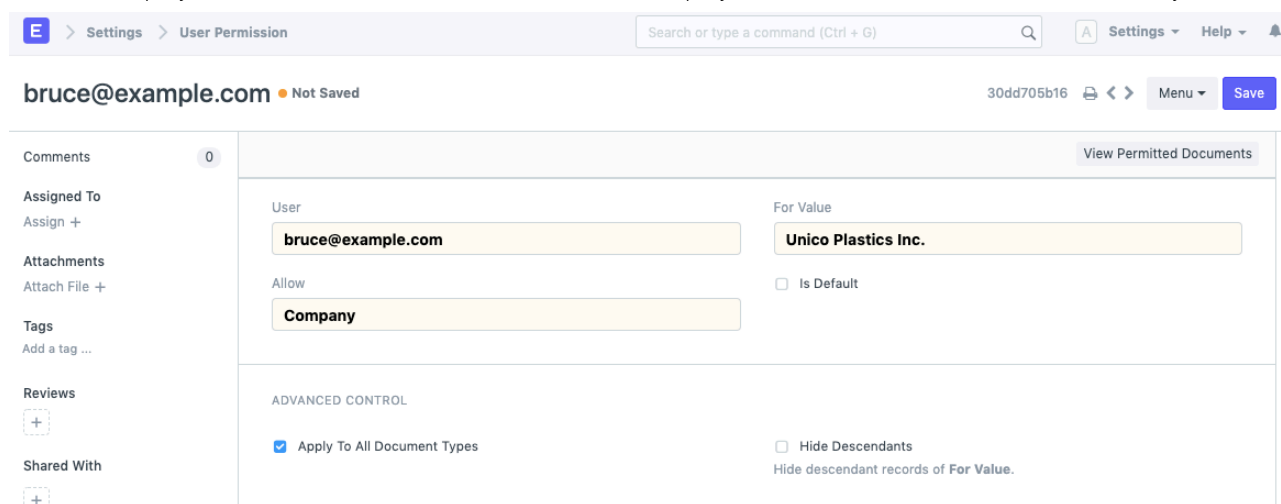
1. Allowing user to access data belonging to one Company
2. Allowing user to access data related to a specific Customer or Territory

To access User Permissions, go to:

Home > User and Permissions > User Permissions

### 1. How to create User Permissions

1. Go to the User Permissions list, click on New.
2. Select the user for which the rule has to be applied.
3. Select the type of document to be allowed (for example "Company").
4. Under For Value, select the specific item that you want to allow (the name of the "Company").
5. If you check 'Is Default', the value selected in 'For Value' will be used by default for any future transactions by this user. That is if company 'Unico Plastics Inc.' is selected as 'For Value', this Company will be set as default for all future transactions by this user.



The screenshot shows the 'User Permission' configuration page. The breadcrumb trail is 'Settings > User Permission'. The user 'bruce@example.com' is selected, with a 'Not Saved' indicator. The 'For Value' field is set to 'Unico Plastics Inc.'. The 'Allow' field is set to 'Company'. The 'Is Default' checkbox is checked. Under 'ADVANCED CONTROL', the 'Apply To All Document Types' checkbox is checked, and the 'Hide Descendants' checkbox is unchecked. The 'View Permitted Documents' link is visible in the top right corner of the form area.

Note: Only a single user permission can be set as default for a particular document type for a specific user.

### 2. More User Permission actions

#### 2.1 Advanced Control

In Advanced Control, you can have better command over where the User Permission is applied.

##### 2.1.1. Applicable For

You can optionally apply user permissions only for specific document type by setting the Document Type after unchecking the Apply To All Document Types checkbox. Setting **Applicable For** option will make the current user permission applicable only under the selected Document Type master.

E

Settings > User Permission

Search or type a command (Ctrl + G)

Settings Help

30dd705b16

Menu Save

Comments 0

Assigned To Assign +

Attachments Attach File +

Tags Add a tag ...

Reviews +

Shared With +

View Permitted Documents

User

bruce@example.com

For Value

Unico Plastics Inc.

Allow

Company

Is Default

ADVANCED CONTROL

Apply To All Document Types

Hide Descendants

Applicable For

Sales Order

Hide descendant records of For Value.

In the above User Permission, the user will be able to access only Sales Orders of the selected company.

**Note:** If **Applicable For** is not set, User Permission will apply across all related Document Types.

### 2.1.2. Hide Descendants

The value of **Allow** could be a DocType with a Tree View, which will have records with a parent-child or ancestor-descendant relationship. Let's assume **For Value**, 'Unico Plastics Inc.', has a child company 'Unico Toys'. When a User Permission is created for 'Unico Plastics Inc.', permissions for its descendants are granted as well.

**Hide Descendants** is visible only on selecting a Tree View DocType. By enabling this checkbox, permissions for descendants of **For Value** will not be granted.

E

Settings > User Permission

Search or type a command (Ctrl + G)

Settings Help

cee441a8cf

Menu Save

Comments 0

Assigned To Assign +

Attachments Attach File +

Tags Add a tag ...

Reviews +

Shared With +

View Permitted Documents

User

mari@erpnext.com

For Value

Unico Plastics Inc.

Allow

Company

Is Default

ADVANCED CONTROL

Apply To All Document Types

Hide Descendants

Applicable For

Hide descendant records of For Value.

A user that can view records of 'Unico Plastics Inc.' will not be able to view those of 'Unico Toys'.

### 2.2 Ignoring User Permissions on Certain Fields

Another way of allowing documents to be seen by everyone that have been restricted by User Permissions is to tick "Ignore User Permissions" on a particular field by going to **Customize Form**.

For example, you don't want Assets to be restricted for any user, then select **Asset** in form type. Under the fields table, expand the Company field and tick on "Ignore User Permissions".

MAN ENERGY

- 47 -

P.O.Box 128448, Dubai, United Arab Emirates  
man.energy

E

Search or type a command (Ctrl + G)

P Settings Help 99+

Cu

☐ In Global Search
 ☐ Bold

PERMISSIONS

Depends On

1

☒ Ignore User Permissions
 ☐ Allow on Submit
 ☐ Report Hide
 ☒ Remember Last Selected Value

### 2.3 Strict Permissions

This restricts user access to documents in a stricter way.

To know more, go to the [System Settings page](#).

### 2.4 Checking How User Permissions are Applied

Finally, once you have created your air-tight permission model, and you want to check how it applies to various users. You can see it via the **Permitted Documents for User** report. Using this report, you can select the **User** and document type and view which documents a particular user can access.

Tickling on the Show Permissions checkbox will show the read/write/submit and other access levels.

E > Settings

Search or type a command (Ctrl + G)

P Settings Help 99+

Permitted Documents For User

Menu Refresh

bruce@example.com

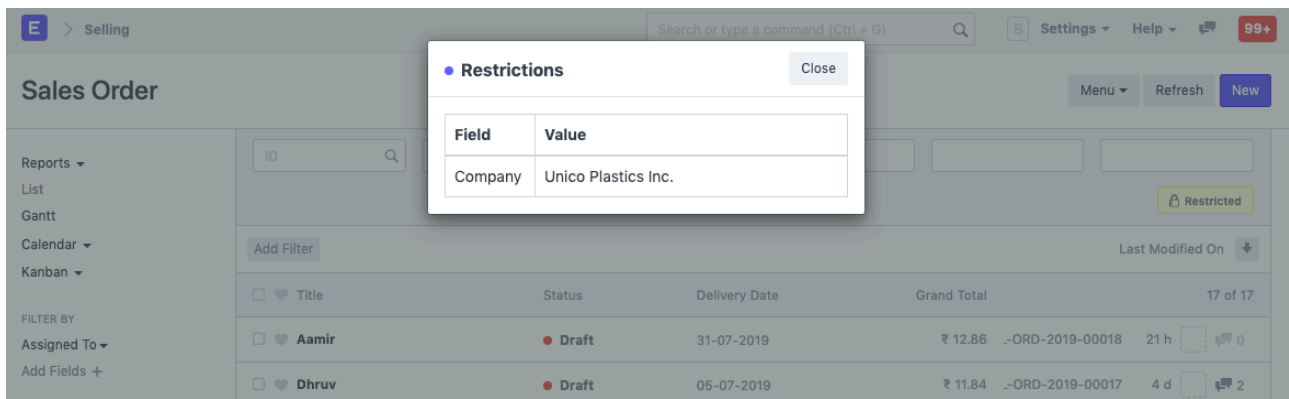
Sales Order

☐ Show Permissions

|    | Name               | Delivery Date | Grand Total | Status           | % Delivered | % Amount ... |
|----|--------------------|---------------|-------------|------------------|-------------|--------------|
| 1  | SAL-ORD-2019-00017 | 05-07-2019    | ₹ 11.84     | Draft            | 0%          | 0%           |
| 2  | SAL-ORD-2019-00016 | 30-06-2019    | ₹ 8.40      | Draft            | 0%          | 0%           |
| 3  | SAL-ORD-2019-00015 | 30-06-2019    | ₹ 8.40      | Draft            | 0%          | 0%           |
| 4  | SAL-ORD-2019-00012 | 30-06-2019    | ₹ 8.40      | Draft            | 0%          | 0%           |
| 5  | SAL-ORD-2019-00005 | 22-04-2019    | ₹ 20.00     | Draft            | 0%          | 0%           |
| 6  | SAL-ORD-2019-00004 | 21-04-2019    | ₹ 20.00     | Draft            | 0%          | 0%           |
| 7  | SAL-ORD-2019-00014 | 30-06-2019    | ₹ 8.40      | To Deliver an... | 0%          | 0%           |
| 8  | SAL-ORD-2019-00013 |               | ₹ 0.00      | To Deliver an... | 0%          | 0%           |
| 9  | SAL-ORD-2019-00010 | 27-06-2019    | ₹ 39,490.86 | To Deliver an... | 0%          | 0%           |
| 10 | SAL-ORD-2019-00009 | 01-06-2019    | ₹ 41,916.00 | To Deliver an... | 0%          | 0%           |

Note: If you cannot access Sales Order or any other document type in this list, make sure you've set the [roles](#) correctly.

For example, the user, Bruce is restricted to Company 'Unico Plastics Inc.'



The screenshot shows the 'Sales Order' page in the ERP system. A modal titled 'Restrictions' is open, displaying a table with the following data:

| Field   | Value               |
|---------|---------------------|
| Company | Unico Plastics Inc. |

The background page shows a list of sales orders with columns: Title, Status, Delivery Date, Grand Total, and Last Modified On. The first two rows are visible:

| Title | Status | Delivery Date | Grand Total             | Last Modified On |
|-------|--------|---------------|-------------------------|------------------|
| Aamir | Draft  | 31-07-2019    | ₹ 12.86 -ORD-2019-00018 | 21 h             |
| Dhruv | Draft  | 05-07-2019    | ₹ 11.84 -ORD-2019-00017 | 4 d              |

## ➤ Role Permission for Page and Report

Access to different pages and reports can be controlled in Role Permission for Page and Report.

Document types are Sales Order, Customer, Supplier, etc. They are a **document type** meaning they can contain multiple documents of that type. A Page is a single page like [Selling Settings](#). You cannot create multiple Selling Settings, but you can create multiple Sales Orders.

In ERP, user can make a custom user interface using Page and a custom report using [Report Builder](#) or [Query Report](#). ERP has a [role-based permission system](#) where you can assign roles to the user. The same role can be assigned to the page and report to access them.

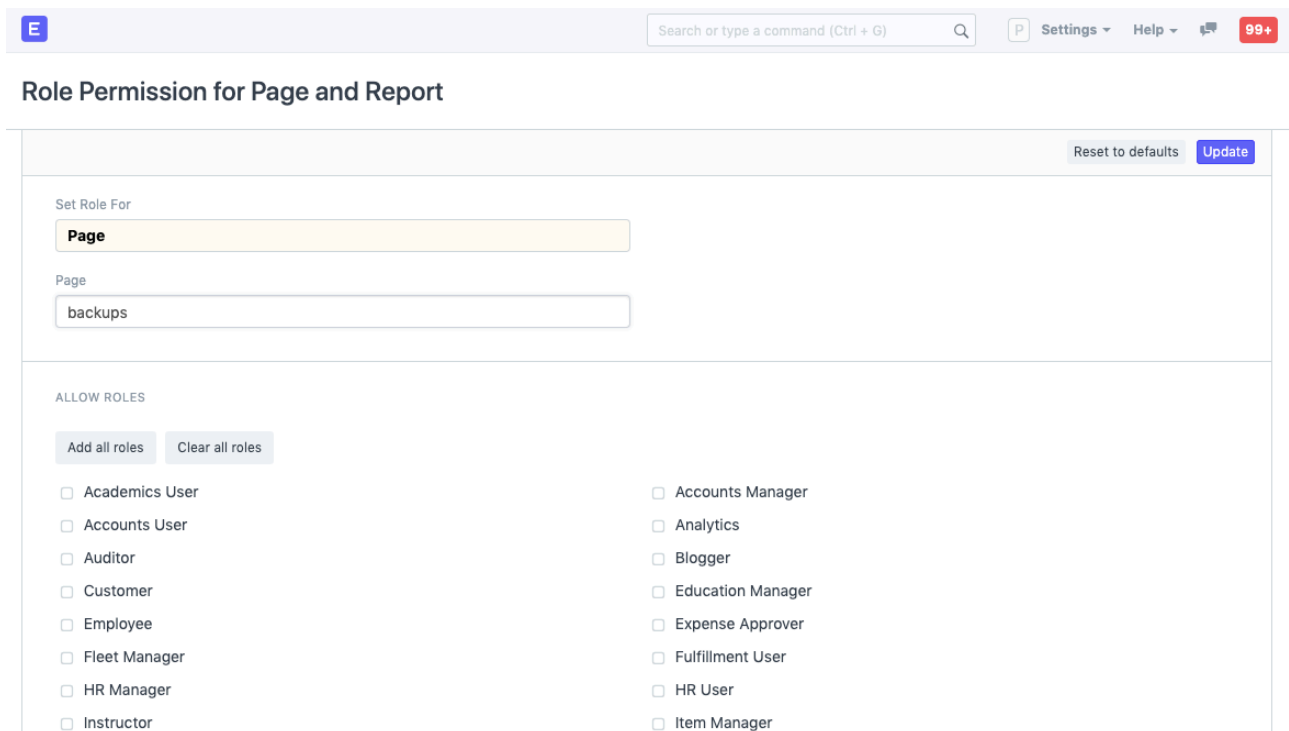
If the user has enabled developer mode, then they can add the roles directly in the page and report record. In that case, the permissions will also be reflected in the JSON file for the page/report. Consider you want to restrict the roles that can access certain pages and reports in ERP, this can be done via the Role Permission for Page and Report.

To access Role Permission for Page and Report, go to:

Home > Users and Permissions > Role Permission for Page and Report

### 1. How to use Role Permission for Page and Report Tool

If developer mode is disabled, the user can assign the roles to the page and report, using "Role Permission for Page and Report" page.



The screenshot shows the 'Role Permission for Page and Report' page. It has a header with 'Reset to defaults' and 'Update' buttons. The main content area is divided into two sections:

**Set Role For**

Page: backups

**ALLOW ROLES**

Buttons: Add all roles, Clear all roles

Roles listed (all unchecked):

- Academics User
- Accounts User
- Auditor
- Customer
- Employee
- Fleet Manager
- HR Manager
- Instructor
- Accounts Manager
- Analytics
- Blogger
- Education Manager
- Expense Approver
- Fulfillment User
- HR User
- Item Manager

#### 1.1 Reset to defaults

Using the "Reset to Defaults" button, the user can remove the custom permissions applied on a page or report. Then default permissions will

be applicable on that page or report.

E

Search or type a command (Ctrl + G)

P

Settings

Help

99+

### Role Permission for Page and Report

Reset to defaults

Update

Set Role For

Page

Page

bank-reconciliation

#### Setting Role Permissions from the Page/Report as a Developer

##### Role Permissions For Page

1. Go to: Home > Developer > Page.
2. Add a row and select which other roles can access the Page.

E

> Page

Search or type a command (Ctrl + G)

P

Settings

Help

99+

### backups Not Saved

Menu

Save

Attach File +

Tags

Add a tag ...

Reviews

+

Shared With

+

♥

Administrator edited this 4 years ago

Administrator created this 4 years ago

PAGE HTML

Title

Download Backups

Module

Desk

icon

Restrict To Domain

Standard

Yes

Roles

| <input type="checkbox"/> | Role                   |  |
|--------------------------|------------------------|--|
| <input type="checkbox"/> | 1 System Manager       |  |
| <input type="checkbox"/> | 2 Role                 |  |
| <input type="checkbox"/> | All                    |  |
|                          | Non Profit Portal User |  |
|                          | Non Profit Member      |  |

##### Role Permissions For Report

1. Go to: Home > Developer > Report.
2. Add rows with roles who can access the Report.

E > Report

Search or type a command (Ctrl + G)

P Settings Help 99+

Sales Analytics • Enabled

Administrator created this 9 months ago

Roles

| <input type="checkbox"/> | Role               |   |
|--------------------------|--------------------|---|
| <input type="checkbox"/> | 1 Stock User       | ▼ |
| <input type="checkbox"/> | 2 Maintenance User | ▼ |
| <input type="checkbox"/> | 3 Accounts User    | ▼ |
| <input type="checkbox"/> | 4 Sales Manager    | ▼ |

Add Row

☐ Disable Prepared Report

### ➤ Sharing

**You can share documents with other users via sharing in ERP.**

In addition to user and role permissions, you can also share a document with another user if you have sharing rights for that document. Note that, a shared document will be visible to the other user even if the document is restricted via [User Permissions](#).

To share a document, open the document, click on the "+" icon under sharing and select the user with whom you want to share:

E > HR > Leave Application > HR-LAP-2021-00004

Search or type a command (Ctrl + G)

Help A

Olivia House • Open

Assigned To

Attachments

Attach File

Reviews

Shared With

Tags

Add a tag ...

Connections

Attendance

Reports

Employee Leave Balance

Employee \*

HR-EMP-00003

Employee Name

Olivia House

Leave Type \*

Leave Without Pay

Leave Balance Before Application

0

Share HR-LAP-2021-00004 with

| User                     | Can Read                            | Can Write                | Can Submit               | Can Share                |
|--------------------------|-------------------------------------|--------------------------|--------------------------|--------------------------|
| Everyone                 | <input type="checkbox"/>            | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Share this document with | Can Read                            | Can Write                | Can Submit               | Can Share                |
| anne@gmail.com           | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |

Add

In the popup window, you can either select all users or one particular user.

Read, write, submit, and share access can be granted to the user for this document.

### ➤ Limited User

**The user will get limited access to the system.**

Limited users can access only specific documents of the specific modules. Certain users don't use all the modules and need only specific modules. For example, in the company, to record the daily attendance or leave application every employee was given required system access. But assume 500 people are working in the company out of which only 100 use all documents and the remaining 400 need only documents for daily attendance or leave applications. Such users are limited users.

The User Type document plays an important role to handle this use case. There are default User Types, "System User" and "Website User", the System User can access the desk and website portal whereas the Website User can only access the website portal. To handle the case of

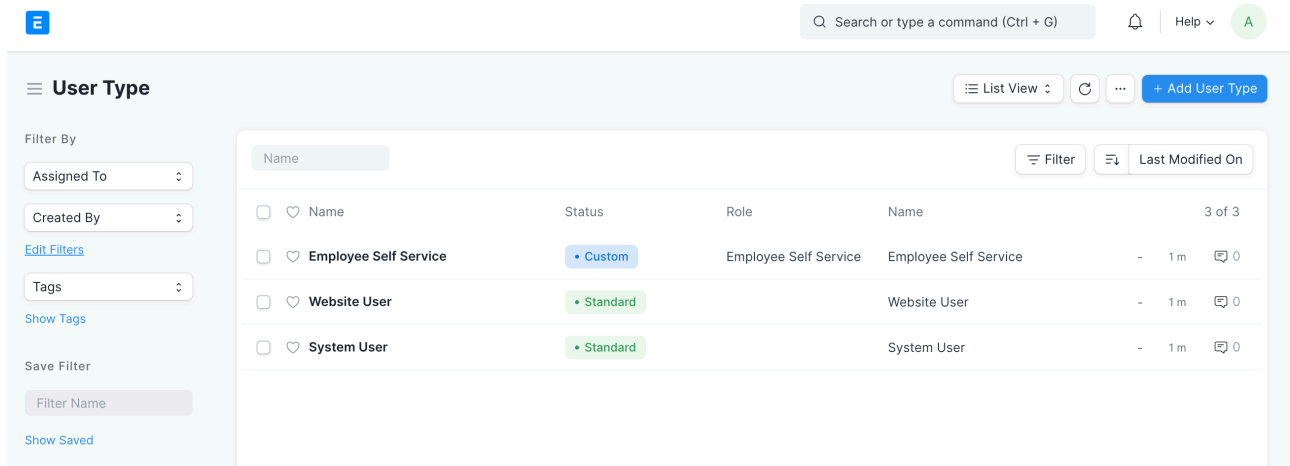


limited access of documents for the employees by default ERP has added a new user type 'Employee Self Service'.

## User Type

To access the User Type document, go to:

Users > User Type

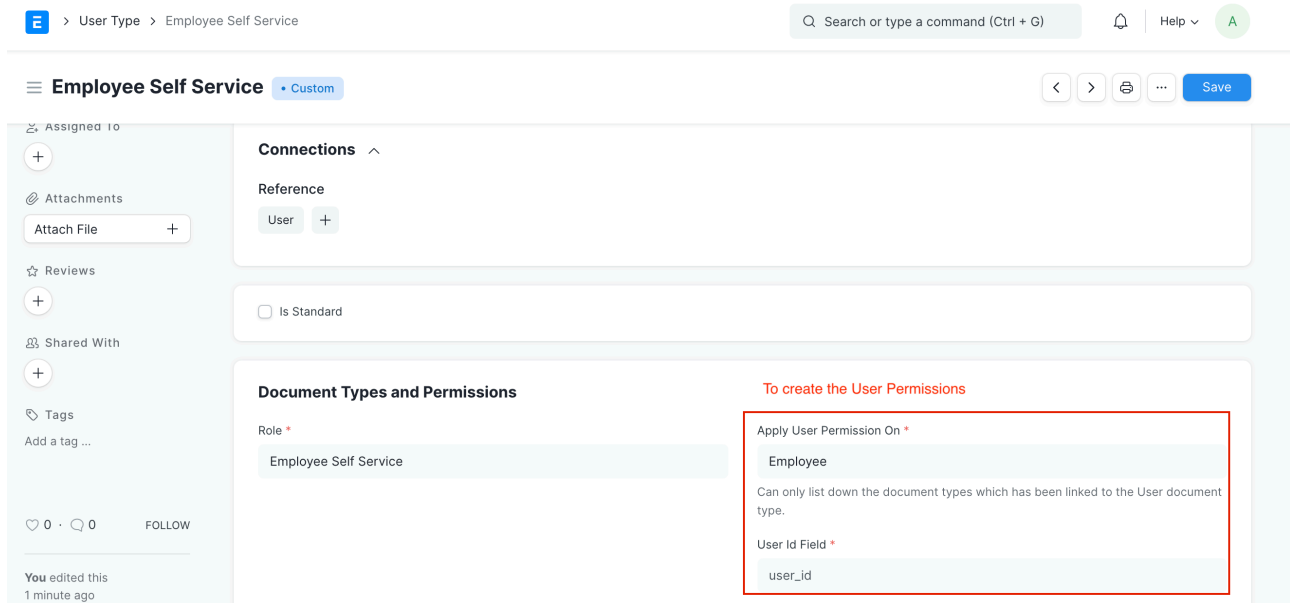


| Name   | Status     | Role                  | Name                  | 3 of 3  |
|--|------------|-----------------------|-----------------------|---------|
| <input type="checkbox"/> <input type="heart"/> Employee Self Service | • Custom   | Employee Self Service | Employee Self Service | - 1 m 0 |
| <input type="checkbox"/> <input type="heart"/> Website User          | • Standard |                       | Website User          | - 1 m 0 |
| <input type="checkbox"/> <input type="heart"/> System User           | • Standard |                       | System User           | - 1 m 0 |

Website User and System User will be standard user types and these cannot be deleted or edited. However, non-standard (Custom) user types can be deleted, created, edited. By default, delete rights are not given to any user.

## Non-Standard User Type

1) For the non standard user type, user has to select the Custom Role, document on which they want to apply the user permission, and the fieldname of the user.



| Role *                | Apply User Permission On *   |
|-----------------------|--|
| Employee Self Service | Employee<br>Can only list down the document types which has been linked to the User document type. |
|                       | User Id Field *<br>user_id   |

In the above image, Employee has the link field User ID which is linked to the User document. As the "Apply User Permission on" has been set as "Employee", then the respective employee's user can only view the documents in which the respective employee field is linked. For example, the employee can only able to view the salary slip which has been created against their employee id.

2) Document Types:

The non-standard user type users can only access the documents which have been mentioned in the user type.

## Employee Self Service

Custom

< > Print ... Save

You created this  
1 minute ago

### Document Types

| <input type="checkbox"/> No. | Document Type                           | Read                                | Write                               | Create                              |                      |
|------------------------------|---|-------------------------------------|-------------------------------------|-------------------------------------|----------------------|
| <input type="checkbox"/> 1   | Salary Slip                             | <input checked="" type="checkbox"/> | <input type="checkbox"/>            | <input type="checkbox"/>            | <a href="#">Edit</a> |
| <input type="checkbox"/> 2   | Employee                                | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/>            | <a href="#">Edit</a> |
| <input type="checkbox"/> 3   | Expense Claim                           | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <a href="#">Edit</a> |
| <input type="checkbox"/> 4   | Leave Application                       | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <a href="#">Edit</a> |
| <input type="checkbox"/> 5   | Attendance Request                      | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <a href="#">Edit</a> |
| <input type="checkbox"/> 6   | Compensatory Leave Request              | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <a href="#">Edit</a> |
| <input type="checkbox"/> 7   | Employee Tax Exemption Declaration      | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <a href="#">Edit</a> |
| <input type="checkbox"/> 8   | Employee Tax Exemption Proof Submission | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <a href="#">Edit</a> |
| <input type="checkbox"/> 9   | Timesheet                               | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <a href="#">Edit</a> |

The above table also acts as the Role Permission Manager for this particular User Type (Employee Self Service in our case). Employee Self Service as a role won't be accessible in the general Role Permission Manager.

### 3) Document Types (Select Permissions Only):

In this table, you need to list down all the doctypes that you want the Employee Self Service User to have SELECT access to. There is no limit to the number of doctypes you can add here. Users will not be able to create the records for the documents to which they have Select perm access.

## Employee Self Service

Custom

< > Print ... Save

### Custom Document Types (Select Permission)

| <input type="checkbox"/> No. | Document Type |                      |
|------------------------------|---------------|----------------------|
| <input type="checkbox"/> 1   | Company       | <a href="#">Edit</a> |

Add Row

### Allowed Modules

| <input type="checkbox"/> No. | Module   |                      |
|------------------------------|----------|----------------------|
| <input type="checkbox"/> 1   | Payroll  | <a href="#">Edit</a> |
| <input type="checkbox"/> 2   | Projects | <a href="#">Edit</a> |
| <input type="checkbox"/> 3   | HR       | <a href="#">Edit</a> |

Add Row

### Adding non-standard User

While adding the new user, the user needs to select the user type. In case of a non-standard user type, the respective user should be linked to the document which has been set in the field "Apply User Permission On".

×

New User

Email \*

Last Name

First Name \*

☒ Send Welcome Email

User Type

→

Employee Self Service

Website User

System User

+ Create a new User Type

Q Advanced Search

## ➤ Administrator

The administrator is above the System Manager and has all the rights and permissions for an ERP account.

A System Manager also has permissions to most items in the system, but the Administrator has unrestricted access.

## PRINTING

### ➤ Printing and Branding

Documents that you send to your customers carry your brand and image and they must be tailored to your requirements. ERP gives you many options so that you can set your organization's branding in your documents.

ERP also gives you the option to print barcode labels, POS receipts and send other raw commands to printers using the Raw Printing feature.

#### Topics\_

- print-settings
- print-format-builder
- print-style
- print-headings
- letter-head
- address-template
- terms-and-conditions
- cheque-print-template
- custom-translations
- raw-printing

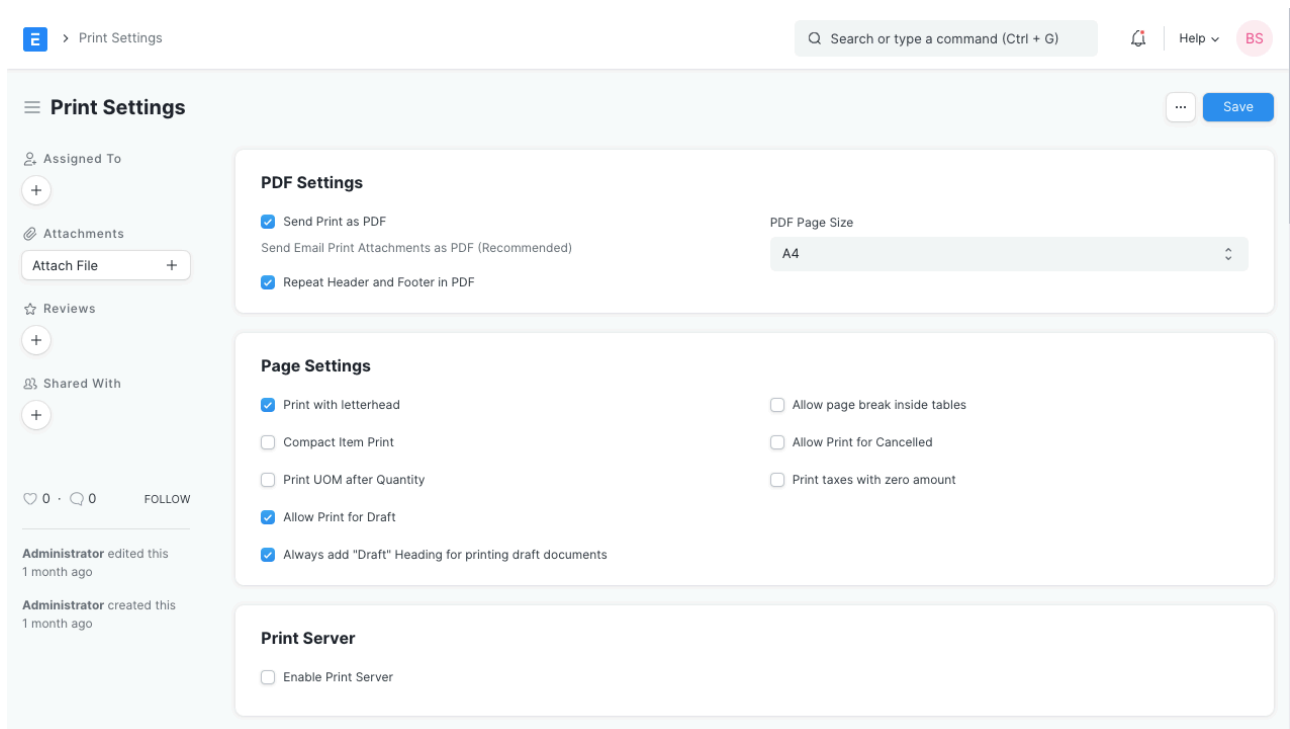
### ➤ Print Settings

In Print Settings you can set your printing preferences like Paper Size, default text size, whether you want to output as PDF or HTML, etc.

Since ERP is a browser-based application, the actual print command is executed by the browser you're using.

To edit Print Settings, go to:

Home > Settings > Print Settings



The screenshot displays the 'Print Settings' interface. On the left, a sidebar lists sections: 'Assigned To' (with a plus icon), 'Attachments' (with an 'Attach File' button), 'Reviews' (with a plus icon), and 'Shared With' (with a plus icon). Below these are social-style interaction buttons: a heart icon with '0', a comment icon with '0', and a 'FOLLOW' button. A recent activity log shows 'Administrator edited this 1 month ago' and 'Administrator created this 1 month ago'. The main content area is titled 'Print Settings' and includes a 'Save' button. It is divided into three sections: 
 

- PDF Settings:** Includes checkboxes for 'Send Print as PDF' (checked), 'Send Email Print Attachments as PDF (Recommended)' (checked), and 'Repeat Header and Footer in PDF' (checked). A 'PDF Page Size' dropdown menu is set to 'A4'.
- Page Settings:** Includes checkboxes for 'Print with letterhead' (checked), 'Compact Item Print' (unchecked), 'Print UOM after Quantity' (unchecked), 'Allow Print for Draft' (checked), 'Always add "Draft" Heading for printing draft documents' (checked), 'Allow page break inside tables' (unchecked), 'Allow Print for Cancelled' (unchecked), and 'Print taxes with zero amount' (unchecked).
- Print Server:** Includes an unchecked checkbox for 'Enable Print Server'.

There are various configurations available in the Print Settings. Let's learn about them.

#### 1. PDF Settings\_

## 1.1 PDF or HTML

When you email any document (like Sales Order/Invoice) from ERP, it is sent in the PDF or HTML format. The file is sent in PDF by default. If you wish to send a document in the HTML format, just uncheck the option "Send Print as PDF".

## 1.2 Repeat Header and Footer in PDF

The letterhead is a master where you can define the standard Header and Footer which is appended to the document's Print Format. If this property is enabled, then Header and Footer are added to each page. If you don't want header and footer repeat on each page, just disable this setting.

## 1.3 PDF Page Size

The default size for printing PDF pages is A4, and you can choose any size from the options defined [here](#), including custom dimensions defined in millimeters.

## 2. Page Settings

### 2.1 Print With Letterhead

Enabling this property will automatically tick the Letter Head option when printing a document. Note that you need to either set Letter Head as default or select one in the transaction for it to appear in the print view.

### 2.2 Compact Item Print

Transactions like sales orders/invoices have a table detailing items bought or sold. It has multiple columns like Item Name, Description, UoM, Rate Amount, etc. If there are many columns in the Item table, then Print Format looks bit cluttered. You can improve the view of the table by enabling Compact Item Print.

As per this setting, there will be only four columns in the Print Format, namely: Description, Qty, Rate, and Amount.

The values of other columns (like name, description, image, serial nos. etc.) are concatenated in the Description column.

When the checkbox is unticked, the print format looks like this:

E > Selling > Quotation

Search or type a command (Ctrl + G)

P Settings Help 99+

Dhruv • Draft

SAL-QTN-2019-00009

Menu Edit

| Sr | Item Code              | Description  | Quantity | Discount Amount | Rate     | Amount   |
|----|------------------------|--|----------|-----------------|----------|----------|
| 1  | PVC pipe 5"            | Made from a strong compound PVC plastic, it will last long without breaking or cracking. No leaks no seeps. Better than those metal pipes that get clogged in a few years. Replacing pipes is a pain especially when they're between the walls. PVC is the way to go.        | Nos 1    | ₹ 0.00          | ₹ 25.00  | ₹ 25.00  |
| 2  | Plastic chair straight | Made from a plastic compound that is sturdy yet gentle enough to support your back while keeping you comfortable. It also arm rests on both sides with corrugations at the joints. The back is straight with a subtle angle to support the natural tendency of leaning back. | Nos 1    | ₹ 0.00          | ₹ 400.00 | ₹ 400.00 |
| 3  | Plastic teapoy         | A table that is large, sturdy, yet light weight to move around easily. Made with carefully placed plastic sections to make the frame strong enough to hold an average person's weight. You can use it to bring out tea and it also doubles up as a stool when needed.        | Nos 1    | ₹ 0.00          | ₹ 700.00 | ₹ 700.00 |

This is what the Compact Print Format looks like:

| E > Selling > Quotation |   | Search or type a command (Ctrl + G) |          | P Settings Help 99+ |
|-------------------------|---|-------------------------------------|----------|---------------------|
| Dhruv • Draft           |   | SAL-QTN-2019-00009                  |          | Menu Edit           |
| Sr                      | Description   | Quantity                            | Rate     | Amount              |
| 1                       | <b>PVC pipe 5"</b><br>Made from a strong compound PVC plastic, it will last long without breaking or cracking.<br>No leaks no seeps.<br>Better than those metal pipes that get clogged in a few years.<br>Replacing pipes is a pain especially when they're between the walls. PVC is the way to go.                | Nos 1                               | ₹ 25.00  | ₹ 25.00             |
| 2                       | <b>Plastic chair straight</b><br>Made from a plastic compound that is sturdy yet gentle enough to support your back while keeping you comfortable.<br>It also arm rests on both sides with corrugations at the joints.<br>The back is straight with a subtle angle to support the natural tendency of leaning back. | Nos 1                               | ₹ 400.00 | ₹ 400.00            |
| 3                       | <b>Plastic teapoy</b><br>A table that is large, sturdy, yet light weight to move around easily.<br>Made with carefully placed plastic sections to make the frame strong enough to hold an average person's weight.<br>You can use it to bring out tea and it also doubles up as a stool when needed.                | Nos 1                               | ₹ 700.00 | ₹ 700.00            |
| Total Quantity          |   | 3                                   | Total    | ₹ 1,125.00          |

### 2.3 Allow Print for Draft

The documents (mostly transactions) have two stages of authentication, Save and Submit. The saved documents are the first draft and not submitted to the system. Hence printing is restricted for the documents at this stage. However, if you wish to permit users to print documents at the Draft stage as well, enable this checkbox.

### 2.4 Always add "Draft" Heading for printing draft documents

Enabling this setting also print "Draft" in the Print Format, thus indicating that document shared is not completely authenticated yet.

### 2.5 Allow Page Break Inside Table

If an item's description captures more than usual space of a page, then enabling this setting will split the item's details to the next page. Hence, a page break will be inserted between the Item Description, and the rest of the details will be pushed to the next page.

### 2.6 Allow Print for Canceled

Canceled transactions are the ones which don't have any impact on the reports. If you wish to allow printing for the canceled transactions, then enable this setting. A transaction can be canceled only once it is submitted.

### 2.7 Print Taxes with Zero Amount

In the sales and purchase transactions, you can add apply multiple taxes on the item. By default, in the print format, only taxes which have some amount calculated are visible. If you wish to also print the tax which was not applied and has zero tax amount, enable this setting.

## 3. Network Printer / Print Server

You can enable print server by filling the print server IP and port. Then chose the default printer.

Before enabling this feature you have to install the pycups library.

You may need first to install cups library if is not already on your system

For Debian OS Family:

```
sudo apt-get install libcups2-dev
```

For Red Hat OS Family:

```
sudo yum install cups-libs
```

After that, install pycups in the env using the command:

```
./env/bin/pip install pycups
```

This is executed from the frappe-bench directory.

## 4. Raw Printing

You can enable raw printing and print to many supported thermal printers. Read [Raw Printing](#) to know more.

## ➤ Print Format

With Print Format, you can set how document types look when printing.

Every transaction has a default Print Format called 'Standard'. You can change Print Formats by:

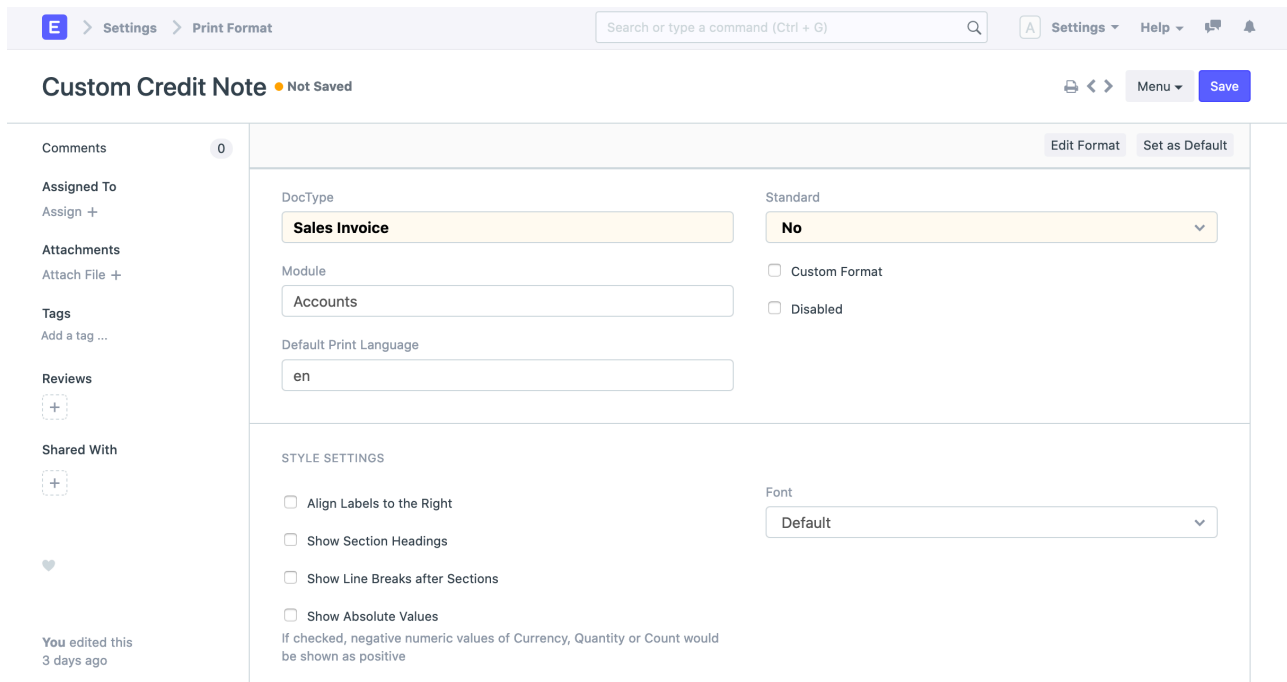
- Using the Print Format form
- Using Jinja/JS scripting under Print Format
- Using the [Print Format Builder](#) to create print formats with UI
- Using Customize Form to hide/unhide fields

To access Print Format, go to:

Home > Settings > Print Format

### 1. How to create a Print Format

1. Go to the Print Format List, click on New.
2. Enter a name and select a DocType for which the Print Format is to be used.
3. The module for which it should apply will be selected automatically.



The screenshot shows the 'Custom Credit Note' configuration page. The breadcrumb trail is 'Settings > Print Format'. A search bar is at the top right. The page title is 'Custom Credit Note' with a 'Not Saved' indicator. On the left sidebar, there are sections for 'Comments', 'Assigned To', 'Attachments', 'Tags', 'Reviews', and 'Shared With'. The main content area has two tabs: 'Edit Format' and 'Set as Default'. The 'Edit Format' tab is active, showing the following fields:

- DocType:** A dropdown menu with 'Sales Invoice' selected.
- Module:** A dropdown menu with 'Accounts' selected.
- Default Print Language:** A dropdown menu with 'en' selected.
- Standard:** A dropdown menu with 'No' selected.
- Custom Format:** An unchecked checkbox.
- Disabled:** An unchecked checkbox.
- STYLE SETTINGS:** A section with four unchecked checkboxes: 'Align Labels to the Right', 'Show Section Headings', 'Show Line Breaks after Sections', and 'Show Absolute Values'.
- Font:** A dropdown menu with 'Default' selected.

At the bottom left, there is a note: 'You edited this 3 days ago'.

4. Save.

Under Style Settings, there are options to change the styling options. With those options, you can change the font, align the labels together on the left or right, add headings for sections, etc.

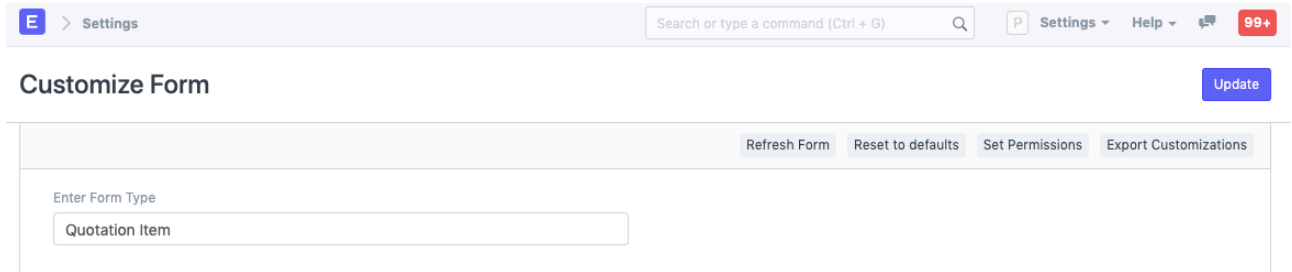
To style the Print Format using custom Jinja/JS, click on Custom Format. If you select this option, there'll be a checkbox for raw printing. To know more about raw printing, [click here](#).

If developer mode is enabled, you can select Standard as yes to contribute a print format as a standard (preset) print format in the system.

### 1.1 Using Customize form to change the Print Format items

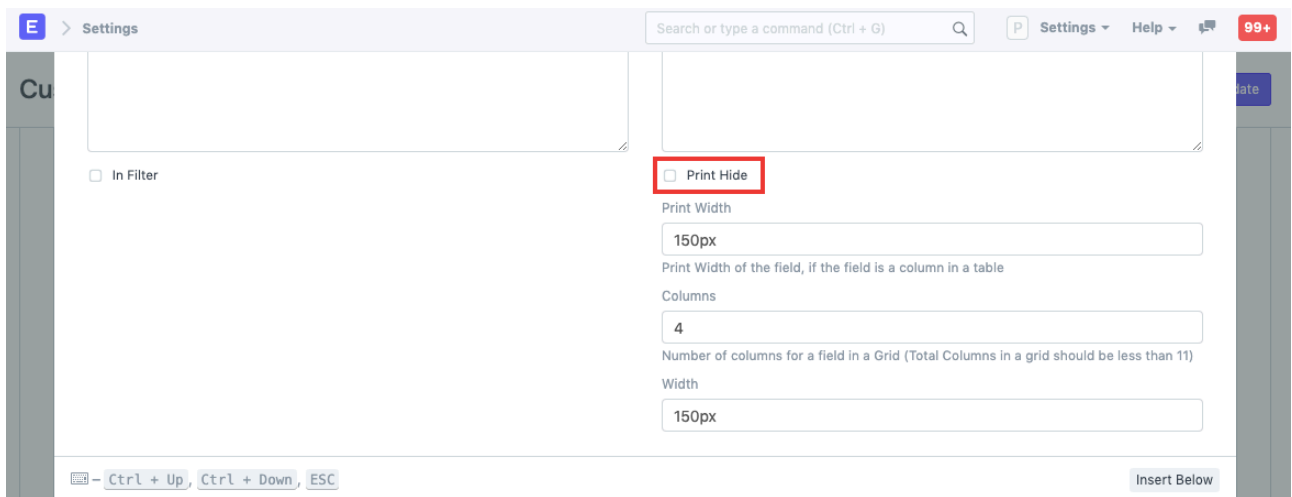
Fields in the transactions and their child tables can be hidden/shown using Customize Form. For example, if you want to hide the 'Item Code' when printing a Quotation, click on the print icon to enter the print screen.

Go to Menu > Customize, select Quotation Item in the 'Enter Form Type' field.

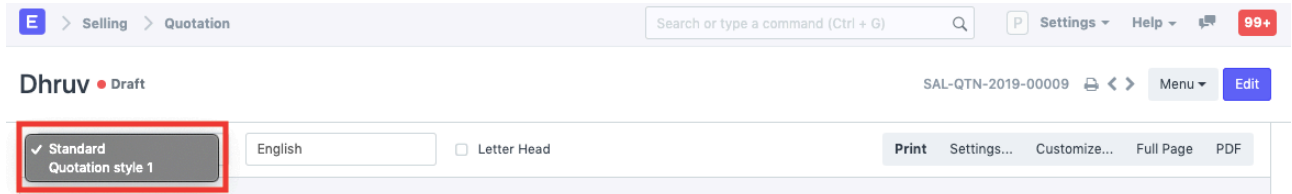


To know more, visit the [Customize Print Format](#) page.

In the fields table, expand the 'Item Code' row, scroll down and tick the 'Print Hide' checkbox.



A newly created Print Format can be selected on the print screen of a transaction. From there you can see how it looks and proceed to print.



## ➤ Print Format Builder

The Print Format builder helps you quickly make a simple customized Print Format by dragging and dropping data fields and adding custom text or HTML.

The 'Standard' Print Format is created by default, it cannot be edited.

To access the Print Format Builder, go to:

Home > Settings > Print Format Builder

Or via a document.

### 1. Using the Print Format Builder

#### 1.1 Via the menu navigation

1. Go to the Print Format Builder.
2. Here you can edit an existing print format or create a new Print Format for a document type like Item, Quotation, etc.
3. Let's see how to edit an existing Print Format in this section. To know about creating a new Print Format, see the next section.
4. Select the Print Format to edit.



**E** > Settings Search or type a command (Ctrl + G) P Settings Help 99+

## Print Format Builder

Edit Properties

Select an existing format to edit or start a new format.

Select Print Format to Edit

Salary Slip Standard

Edit

Select a DocType to make a new format

Name of the new Print Format

Create a New Format

- 5.
6. Click on the Edit button, you will be taken to the Print Format Builder UI.

**E** Search or type a command (Ctrl + G) P Settings Help 99+

## Salary Slip Standard

Menu Save Edit Properties

Filter...

Custom HTML

Posting Date

Employee

Employee Name

Department

Designation

Branch

Status

Journal Entry

Payroll Entry

Company

Letter Head

Salary Slip Based on Tim...

Drag elements from the sidebar to add. Drag them back to trash.

Edit Heading

{{doc.name}}

|               |                   |
|---------------|-------------------|
| Employee      | Start Date        |
| Company       | End Date          |
| Employee Name | Working Days      |
| Department    | Leave Without Pay |

- 7.
8. Here you can drag and drop fields from the sidebar to the page and vice versa.
9. After making the changes, click on Save.

### 1.2 Via a document

1. Open the document for which you want to make a Print Format. Click the Printer icon, or go to Menu > Print and click on the Customize... button. Note: You must have System Manager permission to do this.

E > Selling > Sales Order
 

Search or type a command (Ctrl + G)
 P Settings
 Help
99+

Rohan Overdue

SAL-ORD-2019-00010

Menu

Edit

Standard

English

☒ Letter Head

Print

Settings...

Customize...

Full Page

PDF

SALES ORDER

SAL-ORD-2019-00010

Customer Name

Rohan

Date

22-05-2019

Delivery Date

27-06-2019

Address

101, Blue Heights  
Mumbai  
, India

| Sr | Item Code | Description | Quantity | Discount | Rate | Amount | Weight | Total |
|----|-----------|-------------|----------|----------|------|--------|--------|-------|
|----|-----------|-------------|----------|----------|------|--------|--------|-------|

- To add a field, just drag it from the left sidebar and add it in your layout. You can edit the layouts in sections or individual fields by clicking on the settings icon.
- To remove a field, just drag it back into the fields sidebar.
- Save.

You can add customized text, HTML in your print format, just drag and drop the **Custom HTML** field (in dark color) and add it to the place where you want to add the Custom HTML content.

Then click on **Edit HTML** to edit your content.

## ➤ Print Style

**In Print Style you can define custom CSS styles applied to Print Formats.**

ERP comes with preset styles for printing documents. You can also create new styles using CSS that can be applied to all your print formats.

The standard print Styles in ERP are: Monochrome, Modern, and Classic. To create a new **Print Style** go to:

Home > Settings > Print Style

### 1. How to create a new Print Style

- Go to the Print Style list, click on New.
- Enter a name for the Print Style.
- Enter the CSS that'll define how the style will look like.
- Save.

The styles you create here apply to both standard and custom print formats. To find out the various CSS classes available, you can make a standard print format, open in a new page and see the source.

A default Print Style, can be set from [Print Settings](#).

All Print Format styles are based on Bootstrap (Version 3) CSS Framework.

E

> Print Style

Search or type a command (Ctrl + G)

Q

A

Administrator

Help

20+

Classic

Enabled

Print Settings

C

Comments

0

ASSIGNED TO

Assign +

ATTACHMENTS

Attach File +

TAGS

Add a tag...

SHARED WITH

☐ Disabled
 ☒ Standard

CSS

```

/*
    common style for whole page
    This should include:
    + page size related settings
    + font family settings
    + line spacing settings
*/
.print-format div,
.print-format span,
.print-format td,
.print-format h1,
.print-format h2,
.print-format h3,
.print-format h4 {
    font-family: Georgia, serif;

```

If you have enabled developer mode and tick on Standard then system will generate the JSON file for the Print Style. You can contribute a default print style with this.

## ➤ Print Headings

**Print Headings are the names/titles you can give your transactions.**

These transactions include Sales Invoices, Supplier Quotations, etc. You can create a list of names for different business communications.

If you want to rename a transaction on how it appears when printing, you can do so via Print Headings. For example, a Quotation is also called a "Proposal", Estimate", or "Pro Forma Invoice".

To access Print Headings go to:

Home > Settings > Print Heading

### 1. How to create a Print Heading

1. Go to the Print Heading list, click on New.
2. Enter the heading that will appear on the document.
3. Save.

E

> Print Heading

Search or type a command (Ctrl + G)

Q

P

Settings

Help

92

Pro Forma Invoice

Comments

0

Assigned To

Assign +

Attachments

Attach File +

Tags

Add a tag ...

Description

Pro Forma Invoice, an alternate for quotation.

To use the print heading, select the created print heading in the 'Print Heading' field transaction, shown as follows:

E

> Settings > Print Heading

Search or type a command (Ctrl + G)

Q

P

Settings

Help

99+

Pro Forma Invoice

Comments

0

Assigned To

Assign +

Attachments

Attach File +

Tags

Add a tag ...

Reviews

+

Shared With

+

You edited this

23 days ago

Description

Pro Forma Invoice, an alternate for quotation.

Add a comment

Comment

Ctrl+Enter to add comment

Example of a change in print heading is shown as follows:

E

> Selling > Quotation

Search or type a command (Ctrl + G)

Q

P

Settings

Help


99+

Rohan • Draft

SAL-QTN-2019-00008

Menu

Edit



Unico Plastics Inc

101, Industrial Avenue, Redington Town, NY.

Call: +16277499292 Email: info@unicoplasticsinc.com

PRO FORMA INVOICE

SAL-QTN-2019-00008

DRAFT

Customer Name

Rohan

Date

15-07-2019

Valid Till

31-08-2019

Address

101, Blue Heights

Mumbai

, India

| Sr             | Item Code   | Description | Quantity | Discount Amount | Rate    | Amount   |
|----------------|-------------|-------------|----------|-----------------|---------|----------|
| 1              | PVC pipe 5" | PVC pipe 5" | Nos 10   | ₹ 0.00          | ₹ 25.00 | ₹ 250.00 |
| Total Quantity |             |             | 10       | Total           |         | ₹ 250.00 |
|                |             |             |          | VAT 5% @ 5.0    |         | ₹ 12.50  |

## ➤ Address Template

**Address template can store different formats of addresses based on the region.**

Each region has its way of defining addresses. To manage multiple address formats for your Documents (like Quotations, Purchase Invoices, etc.), you can create country-wise **Address Templates**.

To access address template, go to:

Home > Settings > Address Template

A default Address Template is created when you set up the system. You can either edit it or create a new template. This default template will apply to all countries not having a specific template.

Consider a customer from the United States where 'County' is a part of the address. If you set county in the address template for United States, then it'll show up in the address field and hence in the print preview. Fields like PIN code can be changed to be displayed as ZIP code and fields like county can be added by using Address Templates.

The Address Template checks the 'Country' field in the Address master to apply different address templates to transactions.

### 1. How to create an Address Template

1. Go to the Address Template list, click on New.
2. Select a country.
3. Change the CSS and Jinja if required.
4. Save.

#### 1.1 Jinja Templating

The templating engine is based on HTML and the [Jinja Templating](#) system. All the fields (including Custom Fields) will be available for creating the template.

Here is the default Jinja template:

```
{% raw %}{{ address_line1 }}<br>
{% if address_line2 %}{{ address_line2 }}<br>{% endif -%}
{{ city }}<br>
{% if state %}{{ state }}<br>{% endif -%}
{% if pincode %}PIN: {{ pincode }}<br>{% endif -%}
{{ country }}<br>
{% if phone %}Phone: {{ phone }}<br>{% endif -%}
{% if fax %}Fax: {{ fax }}<br>{% endif -%}
{% if email_id %}Email: {{ email_id }}<br>{% endif -%}{% endraw %}
```

Here is an example:



### ➤ Terms And Conditions

**Terms and conditions contain the terms and conditions of a service/product offered by a seller to a buyer.**

Each Quotation/Sales Order must ideally contain a set of terms of your contract. Terms and conditions are usually included to define terms of service, conditions for using any service or to even limit responsibilities of the seller in case any harm is caused to the buyer due to using the provided goods or services. It is usually a good idea to make template(s) of your Terms and Conditions so that you have a standard set of

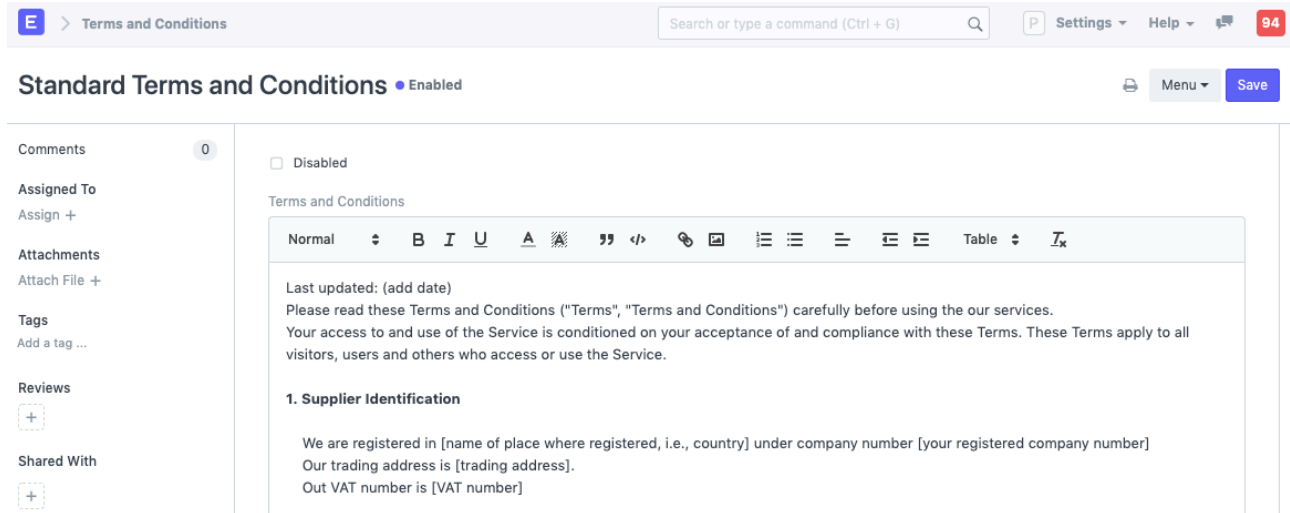
terms.

To access Terms and Conditions template go to:

Home > Selling > Terms and Conditions Template

### 1. How to create Terms and Conditions Template

1. Go to the Terms and Conditions Template list, click on New.
2. Add the Terms and Conditions.



The screenshot shows the 'Standard Terms and Conditions' template editor. The left sidebar contains sections for Comments (0), Assigned To (Assign +), Attachments (Attach File +), Tags (Add a tag ...), Reviews (+), and Shared With (+). The main editor area has a 'Disabled' checkbox and a 'Terms and Conditions' title. Below the title is a rich text editor with a toolbar and the following content:

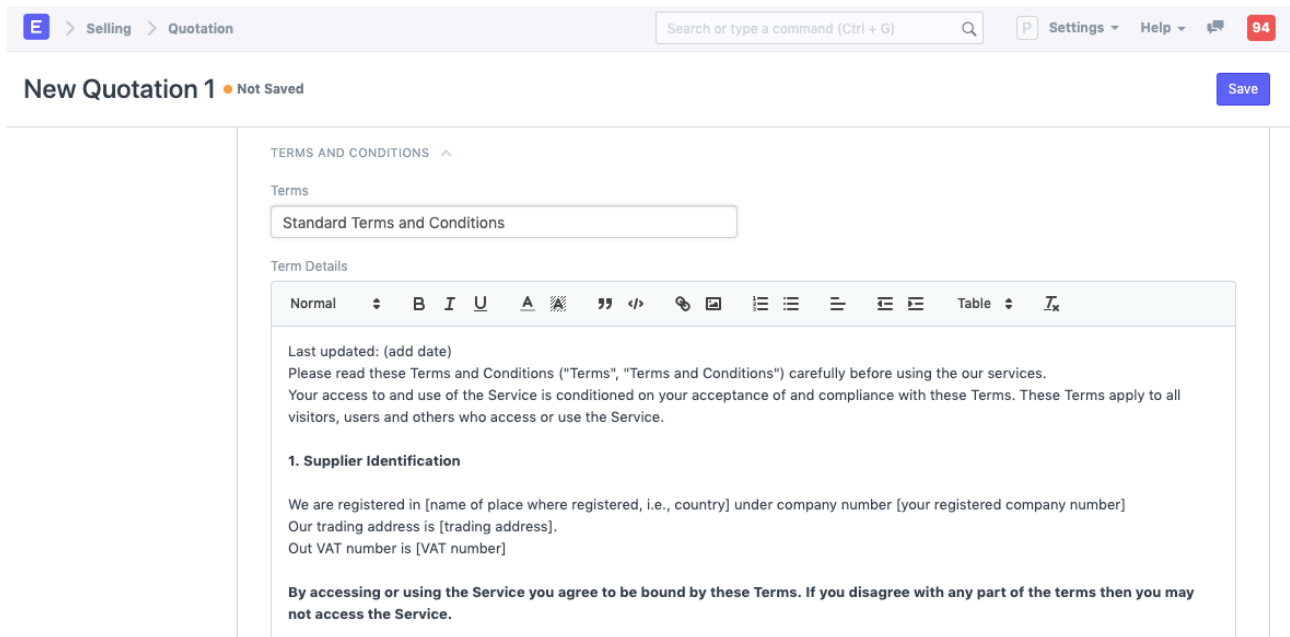
Last updated: (add date)  
 Please read these Terms and Conditions ("Terms", "Terms and Conditions") carefully before using the our services.  
 Your access to and use of the Service is conditioned on your acceptance of and compliance with these Terms. These Terms apply to all visitors, users and others who access or use the Service.

**1. Supplier Identification**

We are registered in [name of place where registered, i.e., country] under company number [your registered company number]  
 Our trading address is [trading address].  
 Out VAT number is [VAT number]

#### 1.1. Select in Transaction

In transactions, you will find a section of Terms and Conditions where you will be able to search and fetch the required Terms and Condition master.



The screenshot shows the 'New Quotation 1' form with the 'TERMS AND CONDITIONS' section expanded. The 'Terms' dropdown is set to 'Standard Terms and Conditions'. The 'Term Details' section shows the same rich text editor content as the previous screenshot, including the '1. Supplier Identification' section.

#### 1.2 Terms and Conditions when printing

Once the Terms and Conditions are set in a Sales/Purchase transaction, it will appear when printing:

E

Buying

Purchase Order

print form

Settings

Help

99+

Super Bazar

Draft

PUR-ORD-2019-00015

Menu

Edit

| Sr | Description | Quantity | Rate     | Amount   |
|----|-------------|----------|----------|----------|
| 1  | Plastic Cup | Nos 1    | ₹ 150.00 | ₹ 150.00 |

Total Quantity

1

Total

₹ 150.00

Grand Total

₹ 150.00

Rounded Total

₹ 150.00

In Words

INR One Hundred And Fifty only.

Last updated: (add date)

Please read these Terms and Conditions ("Terms", "Terms and Conditions") carefully before using the our services. Your access to and use of the Service is conditioned on your acceptance of and compliance with these Terms. These Terms apply to all visitors, users and others who access or use the Service.

**1. Supplier Identification**

We are registered in [name of place where registered, i.e., country] under company number [your registered company number]

Our trading address is [trading address].

Out VAT number is [VAT number]

**By accessing or using the Service you agree to be bound by these Terms. If you disagree with any part of the terms then you may not access the Service.**

**2. Purchases**

If you wish to purchase any product or service made available through the Service ("Purchase"), you may be asked to

### 1.3 What should Terms and Conditions contain?\_

Here are some common topics that Terms and Conditions should contain:

- Validity of the offer.
- Payment Terms (In Advance, On Credit, part advance, etc).
- What is extra (or payable by the Customer).
- Safety/usage warning.
- Warranty if any.
- Return Policy.
- Terms of shipping, if applicable.
- Ways of addressing disputes, indemnity, liability, etc.
- Address and Contact of your Company.

Terms and conditions are the general and special arrangements, provisions, requirements, rules, specifications, and standards that a company follows. These specifications are an integral part of an agreement or contract that the company gets into with its customers, suppliers or partners.

### ➤ Cheque Print Template

**Cheque Print Template allows defining templates for bank cheques.**

Business involves making payment to various parties like suppliers and employees. Payment can be made in various modes like cash, NEFT or cheque. If you are making a payment via a cheque, you can also create a Print Format for printing Cheques from ERP based on the Payment Entry.

To access Cheque Print Template, go to:

Home > Accounting > Cheque Print Template

Using the Cheque Print Template you can generate a new Print Format for cheques. It will be created based on the cheque format provided by your bank.

A sample cheque:



HSBC Bank Middle East Limited  
United Arab Emirates

CHEQUE

Date: \_\_\_\_\_ التاريخ: \_\_\_\_\_

BUR DUBAI

بنك إتش إس بي سي الشرق الأوسط المحدود  
الإمارات العربية المتحدة

Pay \_\_\_\_\_ ادفعوا

against this cheque \_\_\_\_\_ بموجب هذا الشيك

Dirhams \_\_\_\_\_ درهم إماراتي

AED د.إ.

MAN ENERGY L. L. C  
023167117001

000135

Incorporated in the Dubai International Financial Centre.  
Regulated by the Central Bank of the U.A.E and lead  
regulated by the Dubai Financial Services Authority.

أسس في مركز دبي المالي العالمي، يخضع للتنظيم من  
قبل مصرف الإمارات العربية المتحدة المركزي ويخضع  
للتنظيم الرئيسي من قبل سلطة دبي للخدمات المالية.

Signature \_\_\_\_\_ التوقيع

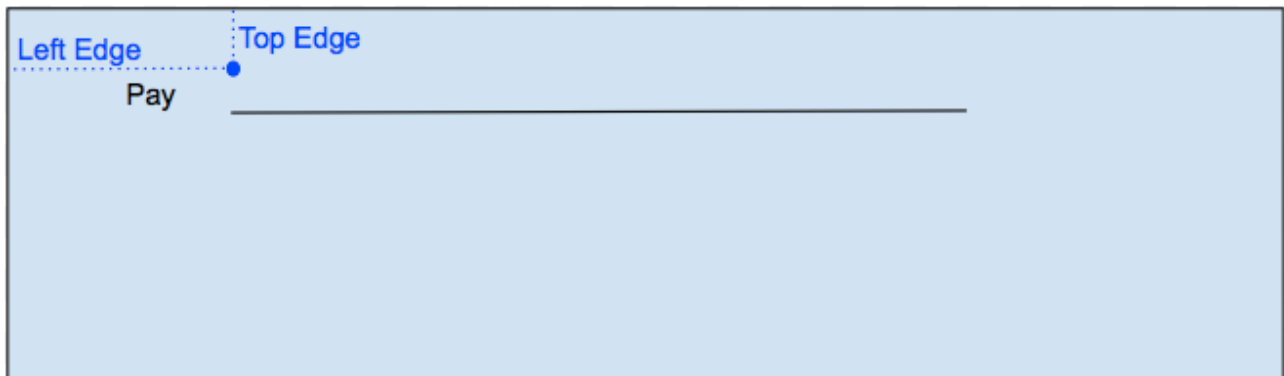
Please do not write below this line يرجى عدم الكتابة تحت هذا الخط

0000 135 30 20 20 1 20 1 6 7 1 700 1 0 1 1

### 1. How to create a Cheque Print Template

1. Go to the Cheque Print Template list, click on New.
2. You can set the position of various items in the cheque.
3. Save.

In the Cheque Print Template, for each value (say Payee, Date), exact coordinates are provided based on where that value should be printed on a cheque. Co-ordinates are provided in centimeters. Here is a representation the structure:



Left Edge

Top Edge

Pay

#### 1.1 New Format by Scanning

To speed up the creation of a new cheque printing format, you can upload a scanned image of the cheque. Considering the scanned image for the cheque, the system automatically updates co-ordinates for each value like party name, amount, date, the amount in words, etc.

#### 1.2 New Print Format manually

If the preview looks good, click on the **Create Print Format** button to create a new Print Format for printing the cheque. Based on the values provided in the Cheque Print Template, the system will auto-generate an HTML script for the cheque's Print Format.

You can manually provide the co-ordinate for each value based on where you want it to be printed on the cheque and customize with HTML/CSS.

#### Preview

Based on coordinates provided for all the values, a preview will be shown as to how the values will be printed on the cheque.



## HDFC

Menu Save

PREVIEW

Acc. Payee 03-07-2019  
Payer Name  
Amount in Words 1000  
Acc. No.  
Signatory Name

### 1.3 Printing Cheques

New print format generated for the cheque will be visible in the Payment Entry form. After creating the payment entry, you will be able to print transaction details on the cheque.

Aamir Submitted

ACC-PAY-2019-00009 Menu Cancel

Comments 0

Ledger

Assigned To  
Assign +

Attachments  
Attach File +

Tags  
Add a tag ...

Reviews  
+

Shared With  
+

♥

You edited this  
12 days ago

TYPE OF PAYMENT

Payment Type

Receive

Posting Date

03-07-2019

Company

Unico Plastics Inc.

Mode of Payment

Cheque

PAYMENT FROM / TO

Party

Aamir

### ➤ Custom Translations

With Custom Translations, user can print the customer's and supplier's document in their local language.

For example, if you have customers from Germany and France who want quotations in German and French, it's possible using Custom Translations.

#### 1. Set the Language

In the Customer master, select the default Language. Say, the default language for the Customer is **Spanish**.

≡ **Tech GmbH** • Enabled
Accounting Ledger Accounts Receivable Create < > ⋮ Save

**More Information** ^

Customer Details

Additional information regarding the customer.

Market Segment

Industry

Print Language

de

☐ Is Frozen

Same way, you can also set default language in the Supplier master.

### 1.1 Print Preview in the Party's Language

In the Print Preview of a transaction, values will be translated into the party's language.

Customer Quotation print preview in customer's default language.

E > Accounting > Sales Invoice > SINV-21-00055
 Q Search or type a command (Ctrl + G)
Help BS


**SINV-21-00055**
Full Page PDF ⋮ Print

Standard

Deutsch

Unico Letter Head

☐ Compact Item Print
 ☐ Print UOM after Quantity
 ☐ Print taxes with zero amount


**Unico**

**VERKAUFSRECHNUNG**  
 SINV-21-00055

**ENTWURF**

**Kundenname:** Tech GmbH
 **Datum:** 06-06-2021

**Zahlungsstichtag:** 07-06-2021

**Business Unit:** Industrials

| Pos | Artikel             | Beschreibung        | Menge | Rabattbetrag | Preis       | Betrag      | Rate of Stock UOM | Rechnungsabgrer  |
|-----|---------------------|---------------------|-------|--------------|-------------|-------------|-------------------|------------------|
| 1   | Consulting Services | Consulting Services | Stk 1 | \$ 0.00      | \$ 3,000.00 | \$ 3,000.00 | \$ 3,000.00       | Deferred Revenue |


Supplier Quotation print preview in supplier's default language.

### 1.2 Changing the print language in the preview

User has the option to select an alternate language on print view.

عمان للطاقة  
**MAN ENERGY**

- 69 -

P.O.Box 128448, Dubai, United Arab Emirates  
 man.energy 


العربية  
Bălgarski  
বাংলা  
ཐུགས་སྐྱོན་  
Bosanski  
Català  
Česky  
Dansk  
Dansk (Danmark)  
**Deutsch**  
ελληνικά  
English  
English (United Kingdom)  
English (United States)  
Español  
Español (Argentina)  
Español (Bolivia)  
Español (Chile)  
Español (Colombia)  
Español (República Dominicana)  
Español (Ecuador)  
Español (Guatemala)  
Español (México)  
Español (Nicaragua)  
Español (Perú)  
Eesti  
فارسی  
Suomi  
Filipino  
Français  
Français Canadien  
Հայերեն

SINV-21-00055

Search or type a command (Ctrl + G)

Help BS

Full Page PDF Print



**VERKAUFSRECHNUNG**  
SINV-21-00055

**ENTWURF**

**Kundenname:** Tech GmbH

**Datum:** 06-06-2021

**Zahlungstichtag:** 07-06-2021

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| Pos | Artikel             | Beschreibung        | Menge | Rabattbetrag | Preis       | Betrag      | Rate of Stock UOM | Rechnungsabgrgr  |
|-----|---------------------|---------------------|-------|--------------|-------------|-------------|-------------------|------------------|
| 1   | Consulting Services | Consulting Services | Stk 1 | \$ 0.00      | \$ 3,000.00 | \$ 3,000.00 | \$ 3,000.00       | Deferred Revenue |

## 2. Custom Translation

Users can set their custom translations using Custom Translations form. For example, if a user wants to set a description of a product in the customer's language (Spanish). For that, create a new translation with language as Spanish, enter source data and translated information.

Home > Customization > Other > Custom Translations > New

E

Translation > 6771ac839a

Search or type a command (Ctrl + G)

Help BS

Assigned To

Attachments

Reviews

Shared With

Tags

MyPET is a leading brand for polyethylene tereph...

Language

de

Source Text

Translated Text

1 MyPET is a leading brand for polyethylene terephthalate

2 plastic.

1 MyPET ist eine führende Marke für

2 Polyethylenterephthalat-Kunststoff.

If your data is in HTML, please copy paste the exact HTML code with the tags.

Expand

The translation is applied when the user selects the language as Spanish on supplier Quotation's print preview. Note that no translation is applied for the second item's description since it wasn't created in the Translation list.

E

> Selling > Quotation > SAL-QTN-2021-00008

Q Search or type a command (Ctrl + G)

Help

BS

SAL-QTN-2021-00008

Full Page


PDF

Print

Deutsch

Unico Letter Head

☐ Compact Item Print
 ☐ Print UOM after Quantity
 ☐ Print taxes with zero amount



Unico

ANGEBOT


SAL-QTN-2021-00008

ENTWURF

Kundenname: Tech GmbH

Datum: 06-07-2021

Gültig bis: 07-07-2021

| Pos          | Artikel-Code | Beschreibung  | Bild  | Menge | Rabattbetrag | Preis        | Betrag       | Rate of Stock UOM |
|--------------|--------------|---|---|-------|--------------|--------------|--------------|-------------------|
| 1            | PETE         | MyPET ist eine führende Marke für Polyethylenterephthalat-Kunststoff. |  | Stk 1 | \$ 0.00      | \$ 99,000.00 | \$ 99,000.00 | \$ 99,000.00      |
| Gesamtmenge: |              |   |   | 1     | Summe        | \$ 99,000.00 |              |                   |

Raw Printing

Sending a string of commands to a printer directly in its native language is called Raw Printing.

Many thermal printers need these raw commands sent to them in order to perform functions like barcode printing, receipt printing, label printing, etc. Raw Printing bypasses the printer's drivers in most cases, making them very fast and reliable. Raw Printing is also capable of doing some advanced features such as cutting receipt paper, kicking out cash drawers, etc.

1. Setting up Raw Printing in ERP\_

1.1 Installing QZ Tray application on the client computer\_

Download and install the QZ Tray application on the computer to which your thermal printer is connected. This application can be found at its [official site](#). Currently, Windows, macOS, and Linux are supported by QZ Tray. During the installation you will be prompted to install Java if not already installed, please install Java to complete the installation.
Further instructions on installing the QZ Tray Application can be [here](#).

1.2 Create Raw Commands Print Format\_

To be able to send raw commands to a printer you need to first create a print format in raw commands. Jinja Templating Language is used in raw commands just like in the [HTML custom print format](#).

To create a new print format for Raw Printing:

- Go to print format list: **Home > Settings > Printing > Print Format**
- Click on New.
- Select the relevant DocType.
- Check the **Custom format** and **Raw Printing** options.
- Fill in the **Raw Commands** field with the required raw commands to be sent to the printer.
- Click Save.

E

> Print Format

Search or type a command (Ctrl + G)

Q

A

Administrator

Help

2

New Print Format 1

Not Saved

Save

Name

Item Barcode Lable

DocType

Item

Module

Stock

Disabled

Standard

No

Custom Format

Print Format Type

Server

Raw Printing

Raw Commands

1 ^XA

2

3 ^F050,50^ADN,36,20^FDPRINTED USING^FS

4 ^F050,100^ADN,36,20^FDQZ-TRAY ^FS

5 ^F050,150^ADN,36,20^FDVERSION 2.0.8^FS

6 ^F050,20^ADN,25,10^FD{{doc.name}}^FS

7

8 ^XZ

Currently, any string-based printer languages can be used in the Raw Commands field in the print format. Writing raw commands requires knowledge of the printer's native language provided by the printer manufacturer. Please refer to the developer manual provided by the printer manufacturer on how to write their native commands.

### 1.3 Enable Raw Printing in the Print Setting

To enable Raw Printing:

- Go to: **Home > Settings > Printing > Print Settings > Raw Printing.**
- Check the **Enable Raw Printing** option.
- Save.

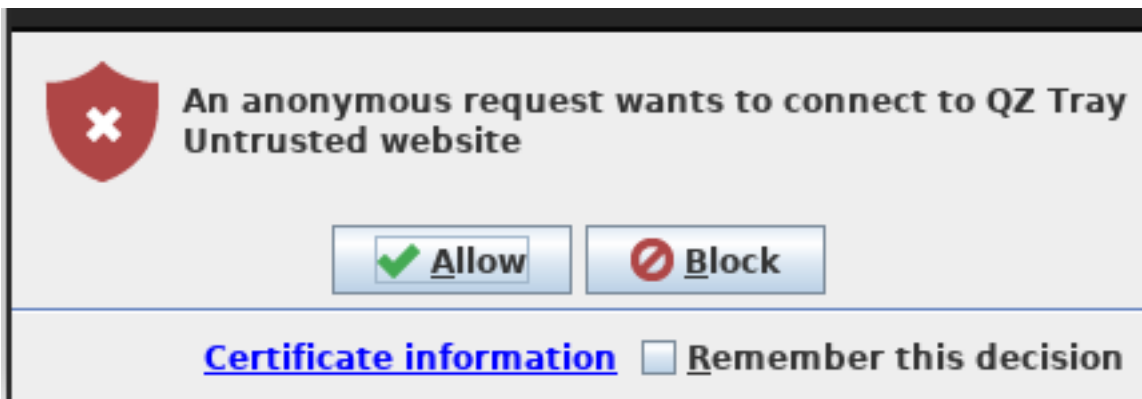
## 2. Methods to utilize raw printing in ERP

There are two ways to send Raw Printing commands to your printer.

### 2.1 Clicking print on the print view page

To print a raw command print format from the Document print view:

- Select appropriate print format. For print format in Raw Commands, "No Preview available" message is shown in place of the print preview.
- Click on the print button.
- Please allow the connection prompt from the QZ Tray for the actions that you initiated (Keyboard Shortcut: Alt + A).



4. You may be asked to select the "print format - printer mapping".

- This mapping is used to send the print commands to the appropriate printer.
- The printer needs to be installed on your computer to be able to map it to a print format.

## Printer Settings

Close

Save

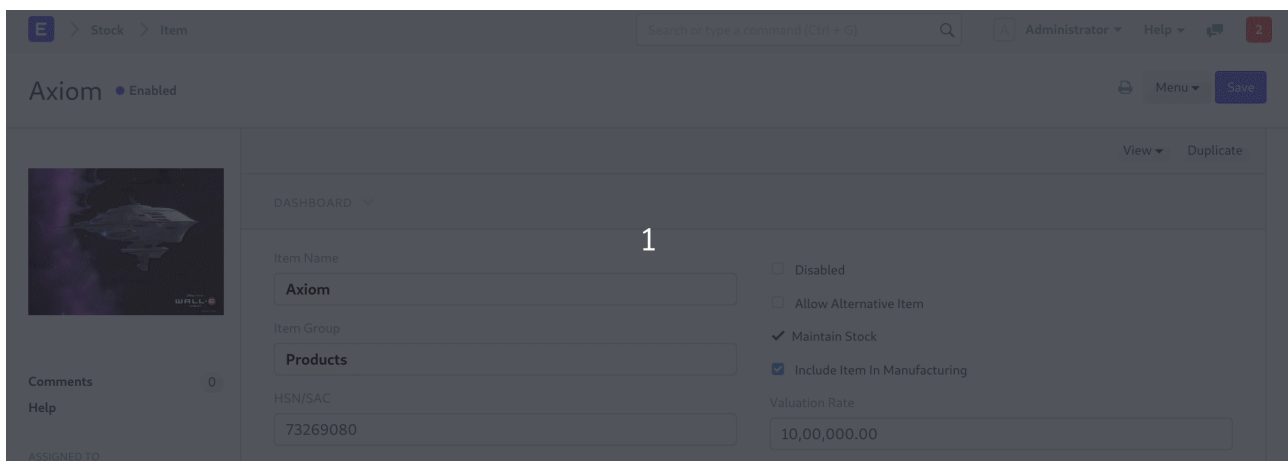
### Printer Mapping

| <input type="checkbox"/>   | Print Format       | Printer |
|----------------------------|--------------------|---------|
| <input type="checkbox"/> 1 | Item Barcode Label |         |

cups-pdf  
 Deskjet\_1050\_J410  
 HP\_LaserJet\_1020

Add Row

- This mapping is stored locally on the same computer and will have to be set on each client machine.
- You can also edit this by clicking on the **Printer Settings** button.



## 2.2 Calling Raw Print functions from a client script

It is often a requirement that a print command has to be issued on a certain event (like submit, save, amend, etc.). It is possible to write a [client script](#) to do this for you.

Following are the relevant Raw Print functions:

1. function: `frappe.ui.form.qz_connect`
  - A connection wrapper to establish a connection with the QZ Tray application.
  - Returns a promise which resolves on successful establishment of a connection.

- Allows active and inactive connections to resolve regardless. Hence it can be called every time before sending a command.
- Usage example:

```
frappe.ui.form.qz_connect()
.then(function () {
    return qz.print(config, data);
})
.then(frappe.ui.form.qz_success)
.catch(err => {
    frappe.ui.form.qz_fail(err);
});
```

Here, qz is a global object provided by the qz-tray.js library.

2. function: frappe.ui.form.qz\_get\_printer\_list
  - Gives you the list of printers available to the QZ Tray application
  - Returns a promise which resolves to a list of printers

Usage example:

```
frappe.ui.form.qz_get_printer_list().then(
    // Required action on getting the printer list.
    // Note: Printer list is a array of strings.
);
```

3. function: frappe.ui.form.qz\_success
  - Displays a "Print Sent to the printer!" alert to the user. Can be called after the print command is successful.
4. function: frappe.ui.form.qz\_fail
  - Displays the error message to the user. Should be called on failure of QZ Tray connection.

You can also directly access the functions provided by the qz-tray.js library via the qz object. [Click here for qz-tray.js library documentation.](#)

Note: The qz object is initialized only after calling the frappe.ui.form.qz\_connect for the first time. In case you require the qz object before that you can use the frappe.ui.form.qz\_init.

## WORKFLOWS

### ➤ Workflows

**With workflows you can rewrite how a particular process/workflow is approved in ERP.**

You can set multiple levels of approval for an ERP Workflow. To allow multiple people to submit multiple requests, for approvals by multiple users, ERP requires you to fill the Workflow conditions. ERP tracks the multiple permissions before submission.

Consider a scenario, where multiple levels of approval are required for a quotation. A sales person (user with 'Sales User' role) will create a quotation. Then it is either approved or rejected by a sales lead (user with 'Sales Manager' role). If approved by sales lead, it is further approved or rejected by regional manager (user with 'Regional Manager' role).

To make a Workflow and transition rules go to:

Home > Settings > Workflow

Once a Workflow is created, you can take actions on it via [Workflow Actions](#).

#### 1. Prerequisites

Before creating a Workflow, it is advised to create these first:

- [Workflow Actions](#)
- Workflow States like Approved, Canceled, etc.

#### 2. How to Create a Workflow

1. Go to the Workflow list, click on New.
2. Enter a name for the **Workflow** and select the DocType on which to be applied.
3. Enter the different states of the Workflow. Enter Doc Status for them, select which field to update from the Update Field column, enter what the value will be updated to under Update Value.

The Workflow States can have different colors according to the state. Eg: Green for success. Document statuses: Saved = 0, Submitted = 1, Cancelled = 2.

E

> Workflow > Quotation Approval Workflow

Q Search or type a command (Ctrl + G)

Help

BS

☰

Quotation Approval Workflow

Active

Go to Quotation List

<

>

🖨

⋮

Save

Add a tag ...

0

0

FOLLOW

You edited this

You created this just now

States

Different "States" this document can exist in. Like "Open", "Pending Approval" etc.

Document States

All possible Workflow States and roles of the workflow. Docstatus Options: 0 is "Saved", 1 is "Submitted" and 2 is "Cancelled"

| <input type="checkbox"/> | No. | State                   | Doc Status | Update Field | Update Value | Only Allow Edit For |      |
|--------------------------|-----|-------------------------|------------|--------------|--------------|---------------------|------|
| <input type="checkbox"/> | 1   | Draft                   | 0          |              |              | Sales User          | Edit |
| <input type="checkbox"/> | 2   | Approval Pending By ... | 0          |              |              | Sales Manager       | Edit |
| <input type="checkbox"/> | 3   | Approval Pending By ... | 0          |              |              | Regional Manager    | Edit |
| <input type="checkbox"/> | 4   | Rejected                | 0          |              |              | Sales User          | Edit |
| <input type="checkbox"/> | 5   | Approved                | 1          |              |              | Regional Manager    | Edit |


Add Row

Transition Rules


Rules for how states are transitions, like next state and which role is allowed to change state etc.

Transitions

4. Enter the Transition Rules.



- 75 -

P.O.Box 128448, Dubai, United Arab Emirates  
 man.energy 



E

> Workflow > Quotation Approval Workflow

Q Search or type a command (Ctrl + G)

Help

BS

≡

Quotation Approval Workflow

Active

Go to Quotation List

<

>

⋮

Save

Transition Rules

Rules for how states are transitions, like next state and which role is allowed to change state etc.

Transitions

Rules defining transition of state in the workflow.

| <input type="checkbox"/> | No. | State                                | Action  | Next State              | Allowed          |                      |
|--------------------------|-----|--------------------------------------|---------|-------------------------|------------------|----------------------|
| <input type="checkbox"/> | 1   | Draft                                | Submit  | Approval Pending By ... | Sales User       | <a href="#">Edit</a> |
| <input type="checkbox"/> | 2   | Approval Pending By Sales Manager    | Approve | Approval Pending By ... | Sales Manager    | <a href="#">Edit</a> |
| <input type="checkbox"/> | 3   | Approval Pending By Sales Manager    | Reject  | Approval Pending By ... | Sales Manager    | <a href="#">Edit</a> |
| <input type="checkbox"/> | 4   | Approval Pending By Regional Mana... | Approve | Approved                | Regional Manager | <a href="#">Edit</a> |
| <input type="checkbox"/> | 5   | Approval Pending By Regional Mana... | Reject  | Rejected                | Regional Manager | <a href="#">Edit</a> |

Add Row

Workflow State Field \*

workflow\_state

Field that represents the Workflow State of the transaction (if field is not present, a new hidden Custom Field will be created)

## 2.2 Things to note when creating a Workflow\_

- Creating a Workflow in ERP essentially overrides the regular Save and Submit workflow. Thus the document will function based on your Workflow and not based on the pre-set code workflow. Hence there might be no Submit button/option if you have not specified it in the Workflow you create.

If you don't apply a Workflow to a document, and that document is submittable, then it has the default workflow with states: Draft - Submitted - Cancelled. If you are applying a Workflow to a submittable document, then those default states should be handled by the user.

- A document cannot be canceled unless it is submitted.
- If you wish to give the option to cancel, you will have to write a workflow transition step that says from submitted you can cancel.
- If fields under Update Field column are not updated, a new custom field will be created with the name you set in the 'Workflow State Field' field.

## 2.3 Other options for a Workflow\_

1. Is Active: On ticking this, all other Workflows for the selected DocType become inactive.
2. Don't Override Status: This Workflow's status will not override the status of the document (Quotation) in the list view.
3. Send Email Alerts: Emails will be sent to the user with next possible workflow actions.

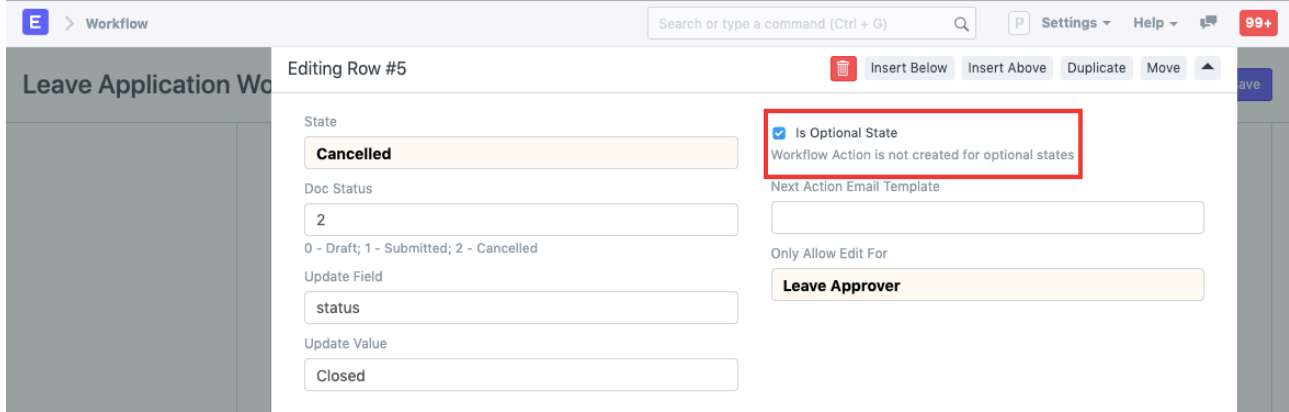
## 3. Features\_

### 3.1 Enable/Disable Optional Workflow State\_

Introduced in Version 12

In States, optional Workflow state means that the state may not be a part of final approval.

E.g. states like Canceled or Rejected can be optional.



**Note:** Workflow Actions are not created for optional states.

### 3.2 Conditions

You can also add a condition for the Transition to be applicable. For example, in this case, if sales executive creates a quotation with grand total of \$100,000 or more, a particular role must approve. For this to happen in the particular transition, you can set a property for **Condition**:  
`doc.grand_total <= 100000`

Here, `grand_total` is the field name of the field 'Grand Total' of Quotation. To see the field name of a field go to Menu > Customize.

This can be extended to any property of the document.

Introduced in Version 13

In Version 13, you can use `date/time`, `session`, `getvalue` and `getlist` functions in your condition expressions.

Allowed functions:

- `frappe.db.get_value`
- `frappe.db.get_list`
- `frappe.session`
- `frappe.utils.now_datetime`
- `frappe.utils.get_datetime`
- `frappe.utils.add_to_date`
- `frappe.utils.now`

Examples:

`doc.creation > frappe.utils.add_to_date(frappe.utils.now_datetime(), days=-5, as_string=True, as_datetime=True)`

### 4. Example of a Quotation Approval Process

When a quotation is saved by sales user, the status of the document changes to "Draft" and when clicked on submit the status changes to 'Approval Pending By Sales Manager':

E

> Selling > Quotation > SAL-QTN-2021-00001

Q Search or type a command (Ctrl + G)

Help

BS

Innovative Chemicals Inc.

Approval Pending By Sales Manager

Get Items From

<

>

...

Actions

Assigned To

+

Attachments

Attach File

+

Reviews

+

Shared With

+

Tags

Add a tag ...

0

0

FOLLOW

You edited this

You created this just now

Connections

Sales Order

Subscription

Quotation To \*

Customer

Date \*

06-09-2021

Customer \*

Innovative Chemicals Inc.

Valid Till

07-09-2021

Customer Name

Innovative Chemicals Inc.

Order Type \*

Sales

Address and Contact

Currency and Price List

When the Sales Manager logs in, he can either Approve or Reject. If approved the status of the document changes to "Approval Pending By Regional Manager".

E

> Selling > Quotation > SAL-QTN-2021-00001

Q Search or type a command (Ctrl + G)

Help

BS

Innovative Chemicals Inc.

Approval Pending By Sales Manager

Get Items From

<

>

...

Actions

Assigned To

+

Attachments

Attach File

+

Reviews

+

Shared With

+

Tags

Add a tag ...

0

0

FOLLOW

You edited this 3 minutes ago

You created this 4 minutes ago

Connections

Sales Order

Subscription

Quotation To \*

Customer

Date \*

06-09-2021

Customer \*

Innovative Chemicals Inc.

Valid Till

07-09-2021

Customer Name

Innovative Chemicals Inc.

Order Type \*

Sales

Address and Contact

Currency and Price List

Approve

Reject

Help

When the Regional Manager opens the quotation, he can finally "Approve" or "Reject" it.

E

> Selling > Quotation > SAL-QTN-2021-00001

Search or type a command (Ctrl + G)

Help

BS

Innovative Chemicals Inc.
 

• Approval Pending By Regional Manager

Get Items From
 <
 >
 Print
 ...
 Actions

Assigned To
 +

Attachments
 Attach File
 +

Reviews
 +

Shared With
 +

Tags
 Add a tag ...

0 · 0 FOLLOW

You edited this 3 minutes ago

You created this 8 minutes ago

Connections
 Sales Order
 Subscription
 Sales Order
 Auto Repeat

Quotation To \*
 Customer
 Date \*
 06-09-2021
 Customer \*
 Innovative Chemicals Inc.
 Valid Till
 07-09-2021
 Customer Name
 Innovative Chemicals Inc.
 Order Type \*
 Sales

Address and Contact

Currency and Price List

Approve
 Reject
 Help

## ➤ Workflow Actions

**Workflow Actions is a single place to manage all the pending actions you can take on Workflows.**

Workflow Actions will send email notifications only if the 'Send Email Alert' checkbox is ticked in the Workflow that you've created.

To access Workflow Actions, go to:

Home > Settings > Workflow Actions

If a User is eligible to take action on some workflows, emails will be sent to the user with the relevant document as attachment. From there the user can Approve or Reject the Workflow.

## Workflow Action Inbox x



**ERPNext** <notifications@erpnext.com>  
to me

7:45 AM (0 minutes ago) ☆ ↩ ⋮

### Workflow Action

Quotation: SAL-QTN-2021-00003

Approve

Reject

Sent via [ERPNext](#)



Also the users will see entries in their Workflow Action list:

**E** > Workflow Action

Search or type a command (Ctrl + G)

Help BS

### Workflow Action

List View ↕ ↻ ⋮

Filter By

Assigned To

Created By

Edit Filters

Tags

Show Tags

Save Filter

Filter Name

Show Saved

Name

Reference Name

Filter

Sort

Last Modified On

| <input type="checkbox"/> | <input type="checkbox"/> | Reference Name     | Status    | Reference Document ... | Name       | 2 of 2   |
|--------------------------|--------------------------|--------------------|-----------|------------------------|------------|----------|
| <input type="checkbox"/> | <input type="checkbox"/> | SAL-QTN-2021-00001 | Completed | Quotation              | 02de4fc42c | - 12 h 0 |
| <input type="checkbox"/> | <input type="checkbox"/> | SAL-QTN-2021-00001 | Completed | Quotation              | 0780d38a5d | - 12 h 0 |

20 100 500

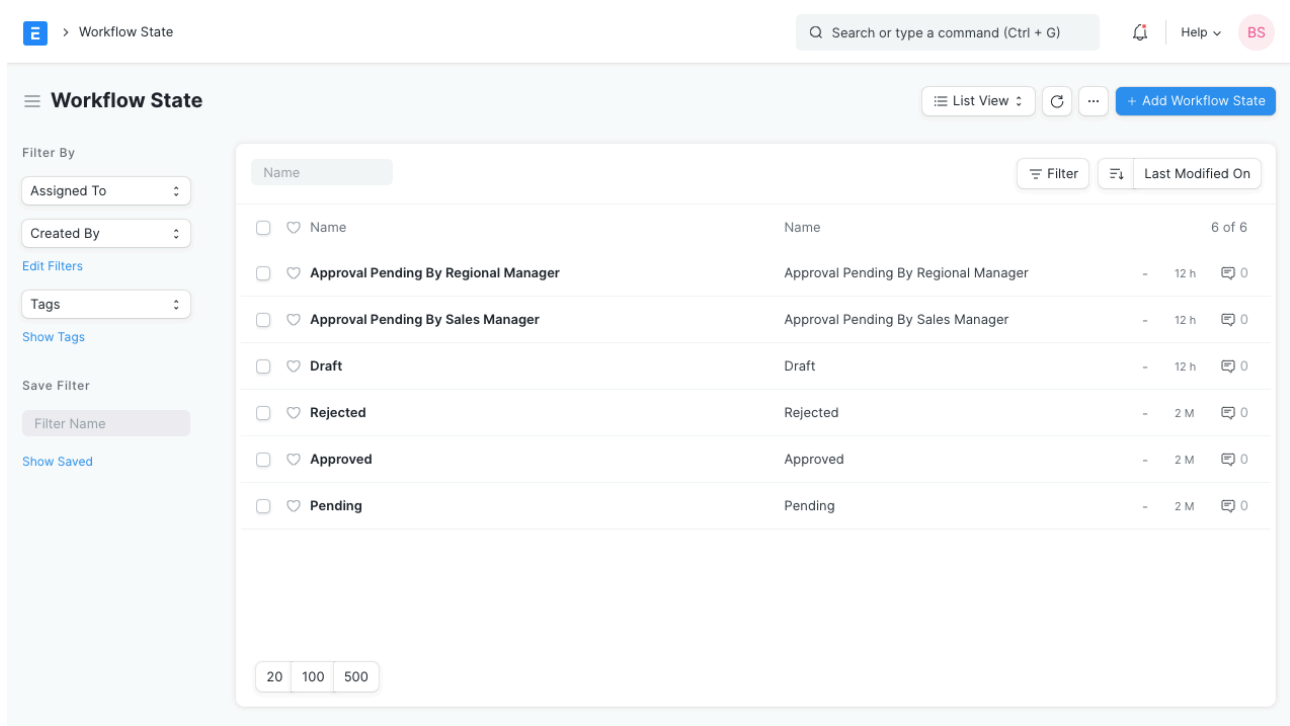
### Note:

- You can set email template for Workflow Actions on each state. The template might consist of a message for users to proceed with the next Workflow Actions.
- Workflow Actions will not be created for a transition to optional states.

### ➤ Workflow State

## A Workflow State is a state in the workflow you create.

Different Workflow States may be achieved before or after applying different Workflow Actions on them. If you want to create a Workflow where there are multiple approvals from manager, senior manager, general manager, etc, you can set the states for it from Workflow States. By default, the following Workflow States are created in ERP:



The screenshot shows the 'Workflow State' management page. On the left, there are filter options: 'Assigned To', 'Created By', 'Tags', and 'Save Filter'. The main area displays a table of workflow states. The table has columns for 'Name', 'Last Modified On', and a 'Filter' button. The states listed are:

| Name                                 | Last Modified On | Filter |
|--------------------------------------|------------------|--------|
| Name                                 | 6 of 6           |        |
| Approval Pending By Regional Manager | - 12 h 0         |        |
| Approval Pending By Sales Manager    | - 12 h 0         |        |
| Draft                                | - 12 h 0         |        |
| Rejected                             | - 2 M 0          |        |
| Approved                             | - 2 M 0          |        |
| Pending                              | - 2 M 0          |        |

At the bottom of the table, there are pagination options: 20, 100, 500.

The Workflow States can have different colors according to the state.

- Success - Green
- Danger - Red
- Inverse - Black
- Primary - Dark Blue
- Info - Light Blue
- Warning - Orange

Document statuses:

- Saved = 0
- Submitted = 1
- Canceled = 2

## EMAIL

### ➤ Email setup

Email is at the heart of electronic communication and ERP is deeply integrated with Email. You can create multiple email accounts, automatically create transactions like Lead, Issue from incoming emails, send documents to your contacts via ERP. You can also setup email digests and email alerts to send you reminders.

### ➤ Email Domain

**An email domain is the name of the network/service you're using for your email account.**

You can skip to [Email Account](#) creation if you are using one of the services listed [here](#).

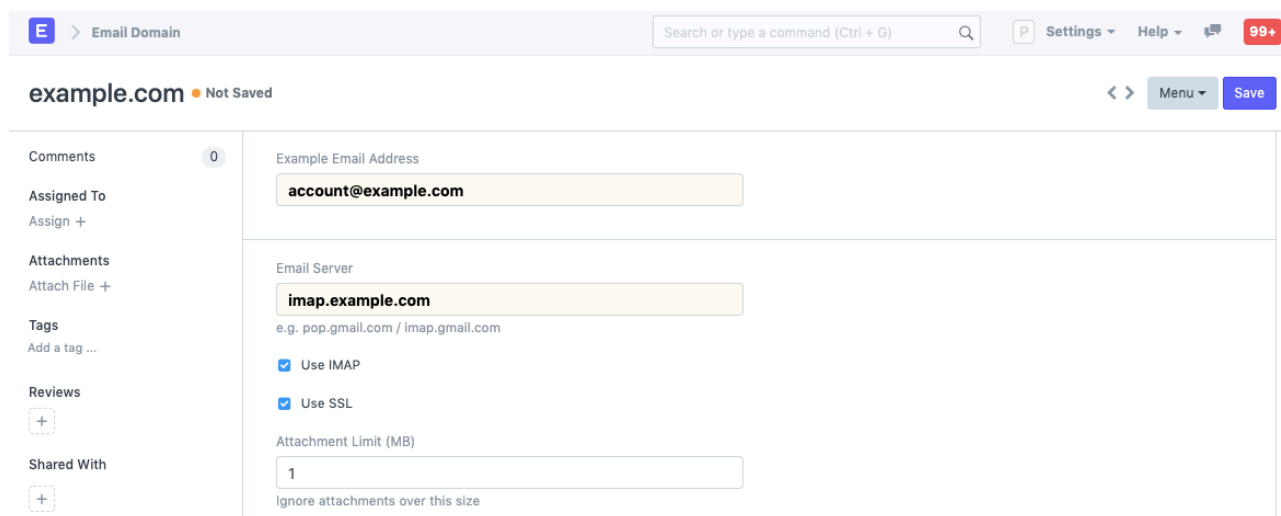
You can configure your Email Domain in ERP for easy setup of all Email Accounts. To find Email Domain settings go to:

Home > Settings > Email Domain

**What is my Email Domain?:** You might have purchased an Email service from your internet service provider or your IT services provider. For example, if you access your business mailbox with URL like <http://mail.yourcompany.com>, then yourcompany.com is your email domain.

If you want to send and receive emails on your ERP account, you need to correctly setup an email domain. You may be using free mail services like GMail or Yahoo. In this case, you don't need to create a domain, instead select a service provider from the list. However, you might have to allow access to ERP for your GMail account.

ERP creates a template email domain using example.com for your reference. You should add your new domain if you want to use it in your ERP account.



The screenshot shows the 'Email Domain' configuration page for 'example.com'. The page has a sidebar with navigation options like 'Comments', 'Assigned To', 'Attachments', 'Tags', 'Reviews', and 'Shared With'. The main content area contains the following fields:

- Example Email Address:** A text field containing 'account@example.com'.
- Email Server:** A text field containing 'imap.example.com'. Below it, there is a note: 'e.g. pop.gmail.com / imap.gmail.com'.
- Use IMAP:** A checked checkbox.
- Use SSL:** A checked checkbox.
- Attachment Limit (MB):** A text field containing '1'.
- Ignore attachments over this size:** A label below the attachment limit field.

#### 1. How to create an Email Domain

1. Go to the Email Domain list, click on New.
2. Enter the Example Email Address. This is where you enter your business email address. For example, if your email ID is yourname@yourcompanyname.com you should enter this.
3. Email Server. This is the URL of your mail server or the email service that you have purchased. For example, it may be mail.yourcompany.com or imap.yourcompany.com.
4. Use IMAP. IMAP and POP are two services used by most mail servers for incoming emails. If your Email server allows IMAP service for the incoming emails keep this checked. Otherwise, leave this unchecked.
5. Use SSL. If your mail server uses SSL (Secure Socket Layer) communication keep this checked.

**Do I have SSL?:** You may have purchased SSL certificate from your IT service provider for SSL and they may have set up SSL for your mail server. If you're using 'https' while accessing mail server over browser then you might have SSL setup.

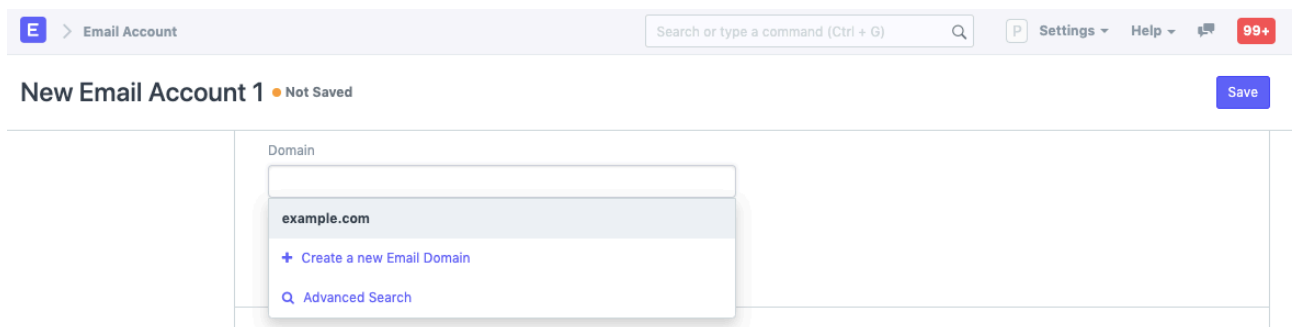
6. Use SSL for Outgoing. If your mailserver uses SSL for outgoing, enable this to explicitly use SSL for outgoing emails. Defaults to port

465.

7. Append Outgoing Email to Sent Folder. If you are not using standard mailservers provided by GMail and similar services, you might need to enable this option to append all outgoing emails to the email account's inbox. (Recommended for email servers like Zimbra and CPanel).
8. Attachment Limit (MB). You can limit the size of file attachments in emails sent from ERP.
9. SMTP Server is the outgoing email service address of your email server.
10. Tick Use TLS if your SMTP service supports TLS for security.
11. Default port. SMTP service is usually set on port 25. If your email server is set up on a separate port number you can set that up here.

### 1.1 After saving the domain

Once you click on save, these settings are validated by ERP and the Email Domain gets saved. Sometimes this could take a few seconds and you might have to wait. This email domain is then available in a dropdown called Domain in the Email Accounts screen.



### Entered everything but still unable to setup Email Domain?

If you've entered and verified the above settings and are still unable to setup Email Domain, you can contact ERP support within your account for help.

## ➤ Email Account

**You can sync your email account with ERP to send and receive emails from ERP.**

You can manage multiple incoming and outgoing Email Accounts in ERP. There has to be at least one default outgoing account and one default incoming account. If you are on the ERP cloud, the default outgoing email is set by us.

To access Email Accounts, go to:

Home > Settings > Email Account

### 1. Prerequisites

Before creating an Email Account, you need an [Email Domain](#). However, you can skip creating an Email Domain if you're using one of the services listed [here](#).

### 2. How to create an Email Account

1. Go to the Email Account list, click on New.
2. Enter the email address with the domain. [Domains](#) need to be created in order to create an email account. You don't need to create a domain if you're syncing an email from certain providers as listed [here](#).
3. Enter the email account password.
4. Save. If the credentials are correct, the email account will be synced.

Note: For some services like Gmail, you may need to turn on the settings to allow less secure apps.

### 2.1 Additional options when creating an Email Account

1. **Use Different Email Login ID:** To use an alternative email login and password to access this account. For example, if you have [notifications@example.com](#) and you want users to access this email with an alternate email ID, they should tick this checkbox.



The recipients will see [notifications@example.com](mailto:notifications@example.com) as the sender.

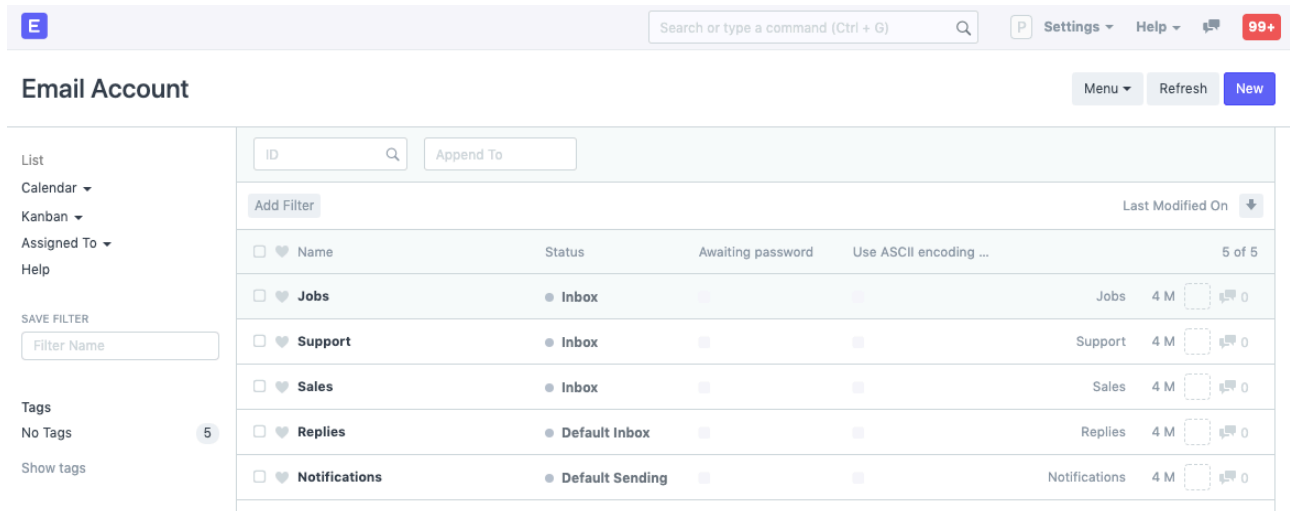
2. **Awaiting password:** If you're creating this account on behalf of someone and the password is unknown, tick this checkbox. When the other user logs in, they'll be prompted to enter the password.
3. **Use ASCII encoding for password:** Ticking this will use ASCII encoding for the password.

### 3. Configuration of the Email Account

#### 3.1 Default Email Accounts

ERP will create templates for a bunch of email accounts by default. Not all of them are enabled. To enable them, you must set valid email account details.

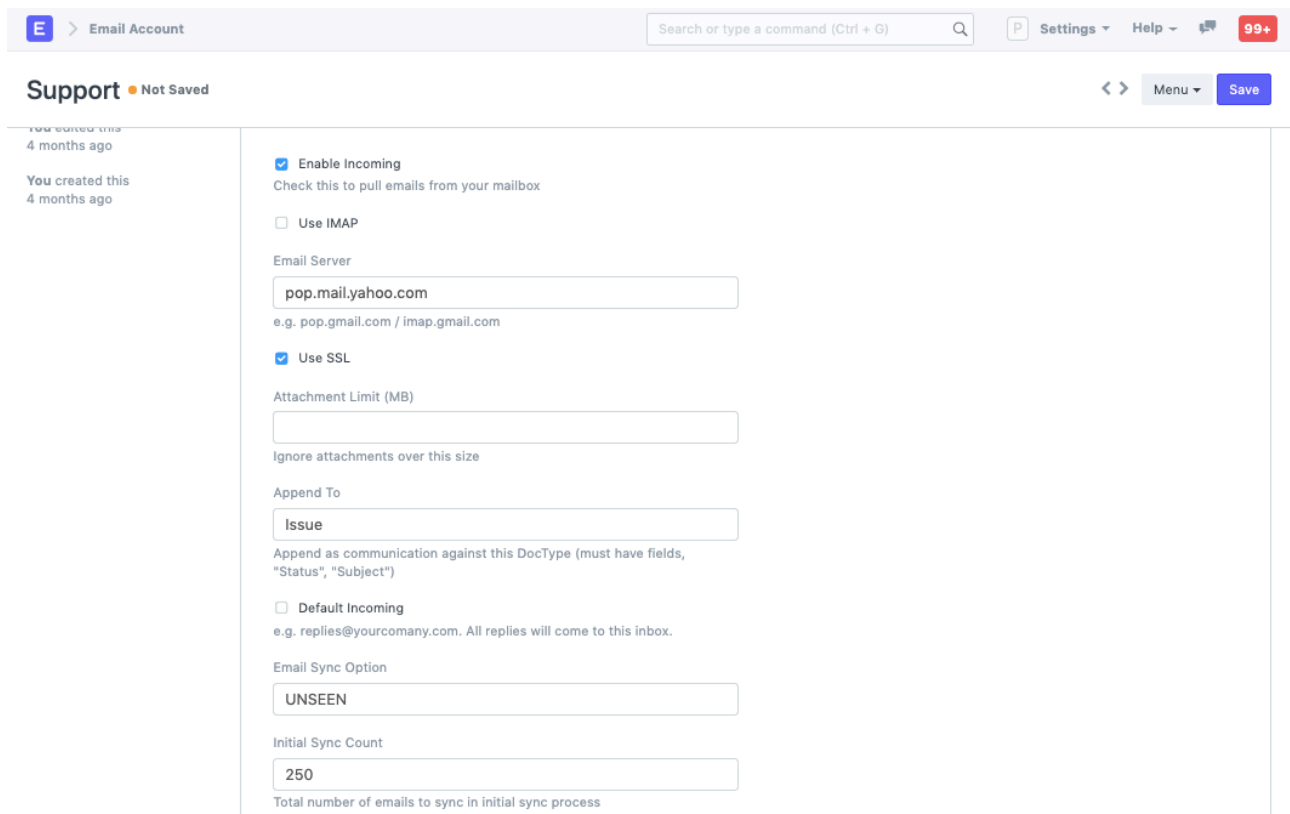
There are two types of email accounts, outgoing and incoming. Outgoing email accounts use an SMTP service to send emails and emails are retrieved from your inbox using an IMAP or POP. Most email providers such as Gmail, Outlook, or Yahoo provide these services.



| ID | Name          | Status            | Awaiting password | Use ASCII encoding ... | Last Modified On  |
|----|---------------|-------------------|-------------------|------------------------|-------------------|
|    | Jobs          | ● Inbox           |                   |                        | Jobs 4 M          |
|    | Support       | ● Inbox           |                   |                        | Support 4 M       |
|    | Sales         | ● Inbox           |                   |                        | Sales 4 M         |
|    | Replies       | ● Default Inbox   |                   |                        | Replies 4 M       |
|    | Notifications | ● Default Sending |                   |                        | Notifications 4 M |

#### 3.2 Incoming Email Accounts

To set up an incoming Email Account, check on **Enable Incoming** and set your POP3 settings, if you are using a popular email service, these will be preset for you.



**Support** • Not Saved

☒ **Enable Incoming**  
Check this to pull emails from your mailbox

☐ Use IMAP

Email Server  
  
 e.g. pop.gmail.com / imap.gmail.com

☒ Use SSL

Attachment Limit (MB)

Ignore attachments over this size

Append To  
  
 Append as communication against this DocType (must have fields, "Status", "Subject")

☐ Default Incoming  
 e.g. replies@yourcompany.com. All replies will come to this inbox.

Email Sync Option

Initial Sync Count  
  
 Total number of emails to sync in initial sync process

The following options are available for incoming emails:

1. **Use IMAP**
2. **Use SSL**
3. **Attachment Limit**
4. **Default Incoming:** If ticked, all replies to your company (eg: [replies@yourcompany.com](mailto:replies@yourcompany.com)) will come to this account.
5. **Email Sync Option:** Whether to sync all or only unseen emails.
6. **Initial Sync Count:** Number of emails to sync the first time.

#### Appending Emails To Documents

This feature creates documents when an email is sent to a particular email account. For example, you can append [support@example.com](mailto:support@example.com) to the Issue DocType. On doing this, whenever an email is sent to [support@example.com](mailto:support@example.com), the system will create an Issue for it. Similarly, if you link [jobs@example.com](mailto:jobs@example.com), when emails are sent to [jobs@example.com](mailto:jobs@example.com), a Job Applicant document is created.

Enable Automatic Linking in Documents will link emails to documents, to know more [click here](#).

#### 3.4 Outgoing Email Accounts

All emails sent from the system, either by the user to contact or via notifications or via transaction emails, will be sent from an Outgoing Email Account.

To set up an outgoing Email Account, check on **Enable Outgoing** and set your SMTP server settings, if you are using a popular email service, these will be preset for you.

E > Email Account

Search or type a command (Ctrl + G)

P Settings Help 99+

Support Not Saved

☒ **Enable Outgoing**  
SMTP Settings for outgoing emails

SMTP Server  
  
e.g. smtp.gmail.com

☒ **Use TLS**

Port  
  
If non standard port (e.g. 587). If on Google Cloud, try port 2525.

☐ **Default Outgoing**  
Notifications and bulk mails will be sent from this outgoing server.

☐ **Always use Account's Email Address as Sender**  
Uses the Email Address mentioned in this Account as the Sender for all emails sent using this Account.

☐ **Always use Account's Name as Sender's Name**  
Uses the Email Address Name mentioned in this Account as the Sender's Name for all emails sent using this Account.

☒ **Send unsubscribe message in email**

☒ **Track Email Status**  
Track if your email has been opened by the recipient.  
Note: If you're sending to multiple recipients, even if 1 recipient reads the email, it'll be considered "Opened"

☐ **Disable SMTP server authentication**

The following options are available for outgoing emails:

1. **Use TLS**
2. **Port**
3. **Disable SMTP server authentication**
4. **Add Signature:** The default signature is appended to the end of each email.
5. **Default Outgoing:** Notifications and bulk emails will be sent from this outgoing server.
6. **Always use Account's Email Address as Sender:** The email address of this account will be mentioned as the sender for outgoing emails.

7. **Send unsubscribe message in an email:** Send a link to unsubscribe from emails sent from this account.
8. **Track Email Status:** Track if your email has been opened by the recipient. Note that, if you're sending to multiple recipients, even if one recipient reads the email, it'll be considered "Opened".
9. **Enable Auto Reply:** If enabled, enter an auto-reply message.
10. **Append Outgoing Email to Sent Folder:** If using custom email servers like Zimbra or CPanel, SMTP will not automatically append emails to the Sent folder. Enabling this option will ensure all emails are explicitly appended to the email account's Sent folder.
11. **Use SSL for Outgoing Emails:** Use SSL as a standard for outgoing emails. Defaults to port 465.

#### 4. How ERP handles replies

In ERP when you send an email to contact like a customer, the sender will be the user who sent the email. In the **Reply-To** property, the Email Address will be of the default incoming account (like [replies@yourcompany.com](mailto:replies@yourcompany.com)). ERP will automatically extract these emails from the incoming account and tag them to the relevant communication.

**Note for self implementers:** For outgoing emails, you should set up your own SMTP server or sign up with an SMTP relay service like mandrill.com or sendgrid.com that allows a larger number of transactional emails to be sent. Regular email services like Gmail will restrict you to a limited number of emails per day.

If you encounter errors when configuring an email account, refer to [this page](#).

#### ➤ Email Inbox

**Once an email account is added, the email inbox will be accessible.**

Running a business involves many transactional email exchanges with parties like Customers and Suppliers and other members within the company. Email Inbox feature allows you to pull all your business emails into your ERP account. Enabling access to business emails with other transactional details makes ERP a single platform for accessing all business information in one place.

In ERP, you can configure Email Inbox for each System User. Following are the detailed steps to configure Email Inbox for a User.

##### 1. Create a User

You can configure an Email Inbox for a System User only. Hence ensure that you have added yourself and your colleagues as a User and assigned them required permissions.

To know how to add a new User, go to the [User page](#).

##### 2. Create an Email Domain

Email Domain for the following Services is available out-of-the-box and you can directly proceed to create an [Email Account](#). Know more about creating an Email Domain [here](#).

- Gmail
- Yahoo
- Sparkpost
- SendGrid
- Outlook.com
- Yandex.mail

E

Settings > Email Account

Search or type a command (Ctrl + G)

P Settings Help 99+

**New Email Account 2**
Not Saved
Save

Password

☒ Awaiting password
   
☐ Use ASCII encoding for password

Email Account Name

☒ Gmail
   
☐ Sendgrid
   
☐ SparkPost
   
☐ Yahoo Mail
   
☐ Outlook.com
   
☐ Yandex.Mail

To be able to send and receive emails into your ERP account from other email services (like WebMail or Gmail), you should set up an Email Domain master. In this master, email gateway details like SMTP Address, Port No., IMAP/POP3 address details are captured. If you have ever configured a local email client (like Outlook), Email Domain master requires details to be fed similarly.

To add new Email Domain, go to:

Home > Settings > Emails > Email Domain > New

E

Email Domain

Search or type a command (Ctrl + G)

P Settings Help 99+

**example.com**
Not Saved
< >
Menu
Save

Comments 0
   
 Assigned To Assign +
   
 Attachments Attach File +
   
 Tags Add a tag ...
   
 Reviews +
   
 Shared With +

Example Email Address
   


---

 Email Server
   

  
e.g. pop.gmail.com / imap.gmail.com
  
☒ Use IMAP
   
☒ Use SSL
   
 Attachment Limit (MB)
   

  
Ignore attachments over this size

Know more about Email Domains [here](#). Once you have configured an Email Domain for your Email Service, it will be used for creating Email Accounts for all the Users in your ERP account.

### 3. Email Account

Create an Email Account based on the Email ID of the User. For each User whose email account is to be integrated with ERP, an Email Account master should be created for it.

If you are creating an Email Account for your colleague who's Email Password is unknown to you, then check field "Awaiting Password". As per this setting, a User (for whom Email Account is created) will get a prompt to enter email password when accessing his/her ERP Account.

**E** > Settings > Email Account Search or type a command (Ctrl + G) P Settings Help 99+

**New Email Account 2** ● Not Saved Save

Gmail will only work if you allow access for less secure apps in Gmail settings. [Read this for details](#)

Email Address

☐ Use Different Email Login ID

Password

☒ Awaiting password

If you are creating an Email Account for Email Inbox of a User, then leave Append To field as blank.

Read [Email Account documentation](#) for more details on how to setup.

#### 4. Linking Email Account in the User master

Once an Email Account is created for a User, select that Email Account in the User. This will ensure that emails pulled from the said Email ID will accessible only to this User in your ERP account.

**E** > Settings Search or type a command (Ctrl + G) P Settings Help 99+

**Bruce Wayne** ● Active prasadsherlock@gmail.com Menu Save

EMAIL INBOX ^

User Emails

| <input type="checkbox"/> | Email Account         | Awaiti... |  |
|--------------------------|-----------------------|-----------|--|
| <input type="checkbox"/> | Bruce's email account |           |  |

Add Row

You can link multiple emails with one user.

#### 5. Using Email Inbox

If you have correctly configured Email Inbox as instructed above, then on the login of a User, Email Inbox icon will be visible. This will navigate the user to Email Inbox view within the ERP account. All the Emails received on that email will be fetched and listed in the Email Inbox view. User will be able to open emails and perform various actions on them.

##### 5.1 Folders

In ERP, you can link multiple Email Accounts with the single User. To switch to Inbox of a different email account and access other folders like Sent Emails, Spam, Trash, click on Email Inbox option in the left bar.

E

> Settings

Search or type a command (Ctrl + G)

B

Settings

Help

99+

## Communication

Reports

List

Calendar

Kanban

Email Inbox

New Email Account

Sent Mail

Spam

Trash

Filter Name

ID

Add Filter

Last Modified On

| <input type="checkbox"/> | Subject                           | Comment Type | Status  | Sent or Received |            |      | 11 of 11 |
|--------------------------|-----------------------------------|--------------|---------|------------------|------------|------|----------|
| <input type="checkbox"/> | Hi                                |              | Open    | Sent             | c94932b26a | 4 d  | 0        |
| <input type="checkbox"/> | Quotation: SAL-QTN-2019-00009     |              | Linked  | Sent             | f5510aee9c | 4 d  | 0        |
| <input type="checkbox"/> | Communication: e5ccf732b4         |              | Linked  | Sent             | e4761789da | 4 d  | 0        |
| <input type="checkbox"/> | Quotation: SAL-QTN-2019-00009     |              | Replied | Sent             | e5ccf732b4 | 4 d  | 1        |
| <input type="checkbox"/> | Quotation: SAL-QTN-2019-00004-3   |              | Linked  | Sent             | b75f80127b | 5 d  | 0        |
| <input type="checkbox"/> | Quotation: SAL-QTN-2019-00004-    |              | Linked  | Sent             | 9907ddd0c2 | 5 d  | 0        |
| <input type="checkbox"/> | Sales Order: SAL-ORD-2019-00017   |              | Linked  | Sent             | f7e7df52c0 | 5 d  | 0        |
| <input type="checkbox"/> | Sales Order: SAL-ORD-2019-00017   |              | Linked  | Sent             | 06f3d92556 | 10 d | 0        |
| <input type="checkbox"/> | Quotation: SAL-QTN-2019-00007     |              | Linked  | Sent             | 002df422aa | 24 d | 0        |
| <input type="checkbox"/> | Opportunity: abc (#CRM-OPP-2019-( |              | Linked  | Sent             | 3392afae0a | 5 M  | 0        |

## 5.2 Actions

On the emails in your inbox, you can take various actions like Reply, Forward, Mark as Spam or Trash.

E

> Settings > Communication

Search or type a command (Ctrl + G)

B

Settings

Help

99+

## Hi • Open

Comments

0

Assigned To

Assign +

Attachments

Attach File +

Tags

Add a tag ...

Reviews

+

Shared With

+

Subject

Hi

TO AND CC

Message

What's up

STATUS

MORE INFORMATION

c94932b26a

<

>

Menu

Email

Jump to field

Links

Duplicate

Reload

Delete

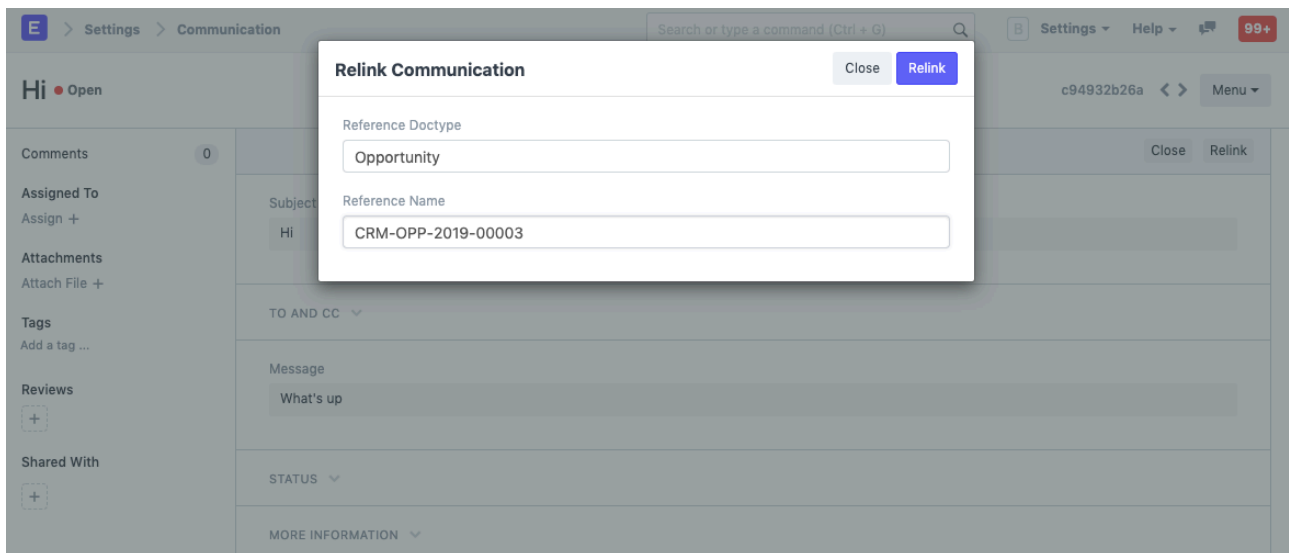
Customize

Edit DocType

New Communication

## 5.3 Relink

You can relink an email to a document like Issue, Lead, Opportunity, etc. based on the context of the email. Select the document type and the document to link the email to.



## ➤ Email Template

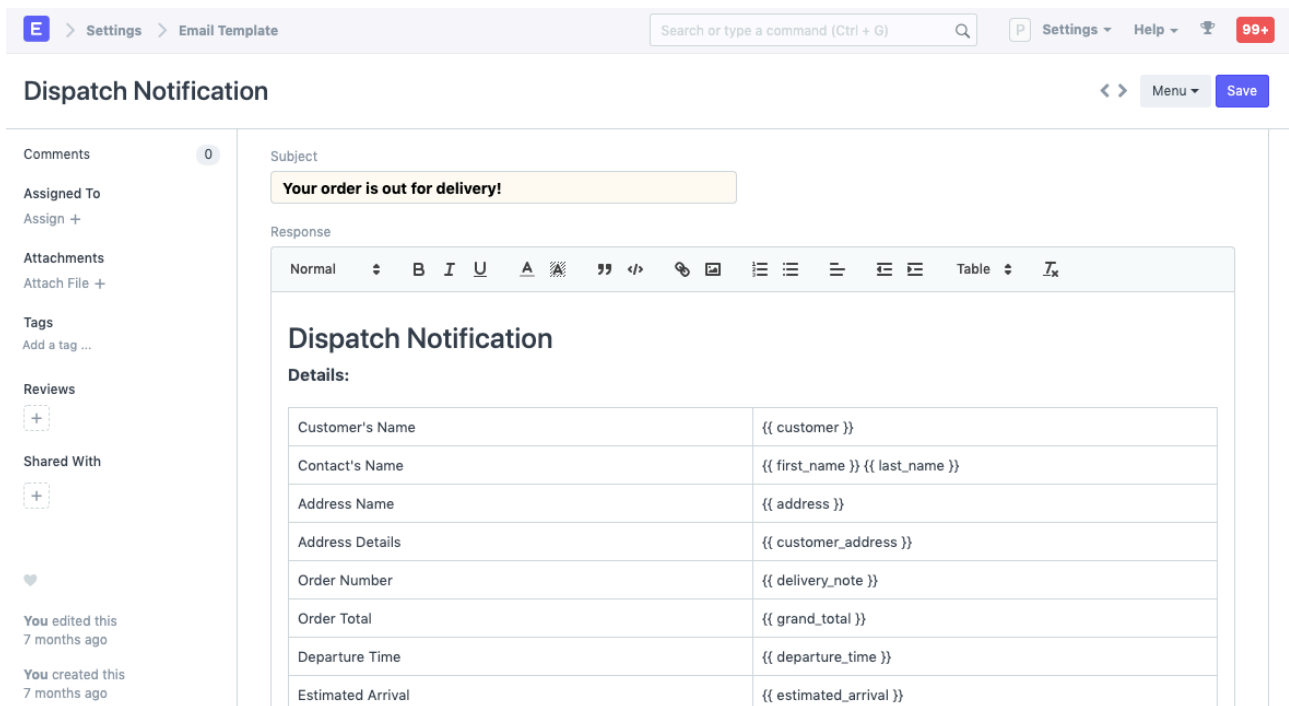
Every email sent is different but certain emails can be standardized, usually known as Email Template or Standard Reply.

To access the Email Template list, go to:

Home > Settings > Email > Email Template

### 1. How to create an Email Template

1. Go to the Email Template list, click on New.
2. Enter a name for this Email Template.
3. Enter a Subject for this Email Template.
4. Response is the standard content of the email that will be a part of this template.
5. Save.



**DocType Associated:** (optional) The DocType associated with this template.

### 1.1 How to use Email Template

You can use this Email Template in the Emails that are sent from ERP in the "CC, BCC & Email Template" field of the email section of the document. ERP will fetch the subject and response as per the template selected.

You can set a Default Email Template for each document type via [Customize Form](#).

## 1.2 How to get fieldnames

The fieldnames you can use in your email template are the fields in the document from which you are sending the email. You can find out the fields of any documents via [Customize Form](#) and selecting the document type (e.g. Sales Order)

## 1.3 Using HTML to build the template

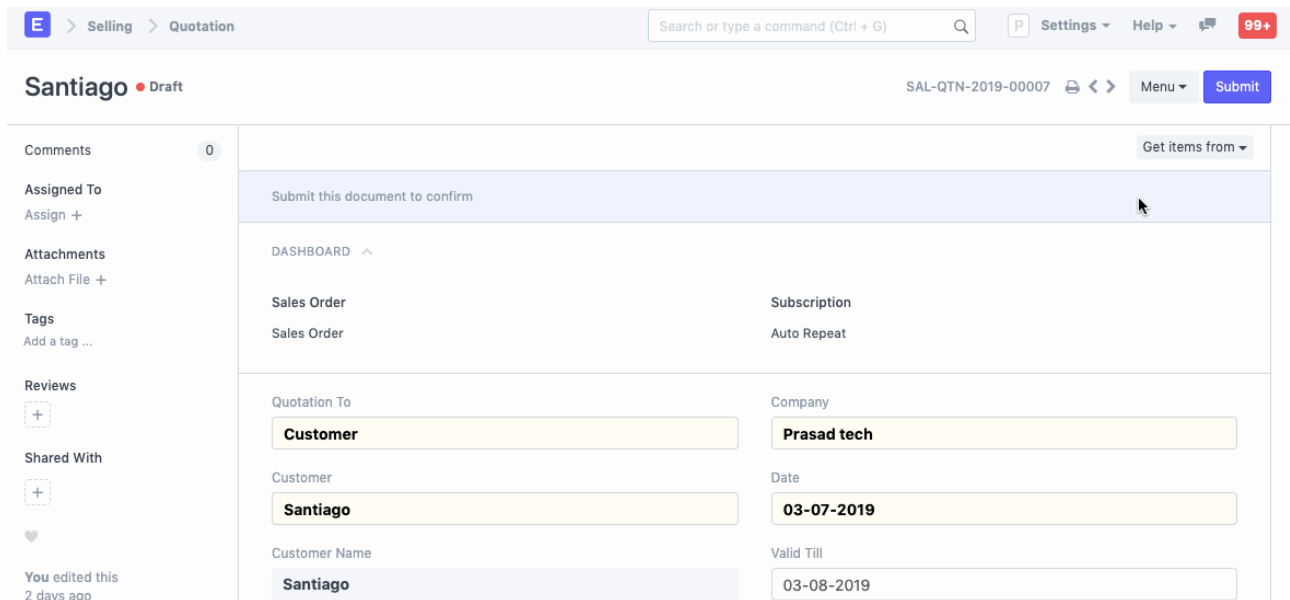
There's a Use HTML check that you can toggle to switch from the text editor to a code editor. This allows finer control over the body of the email and makes it easier to use for features like loops in Jinja.

## 1.4 Templating

Templates are compiled using the Jinja. To learn more about Jinja, [visit this page](#).

## ➤ Sending Email from any Document

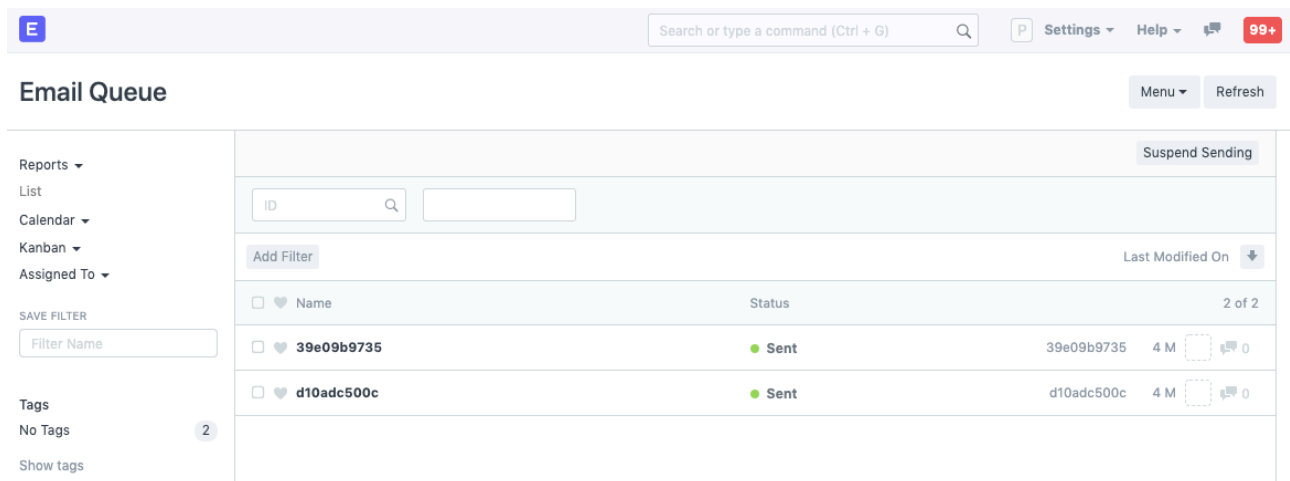
In ERP you can send any document as email (with a PDF attachment) by clicking on Menu > Email after opening any document.



The screenshot shows the ERP interface for a document titled "Santiago" in Draft status. The document ID is SAL-QTN-2019-00007. The interface includes a sidebar with options like Comments, Assigned To, Attachments, Tags, Reviews, and Shared With. The main content area displays a "Submit this document to confirm" button and a "DASHBOARD" section with various fields: Sales Order, Subscription, Quotation To (Customer), Company (Prasad tech), Customer (Santiago), Date (03-07-2019), Customer Name (Santiago), and Valid Till (03-08-2019).

**Note:** You must have outgoing [Email Accounts](#) set up for this.

After you click on send, the email gets added to the email queue. It will be in the Sending status until it is Sent. The status of the email is displayed in the queue, if sending has failed, it can be sent by clicking on Send Now.



The screenshot shows the "Email Queue" section of the ERP interface. It includes a "Suspend Sending" button and a table with columns for ID, Name, Status, and Last Modified On. The table contains two entries, both with a status of "Sent".

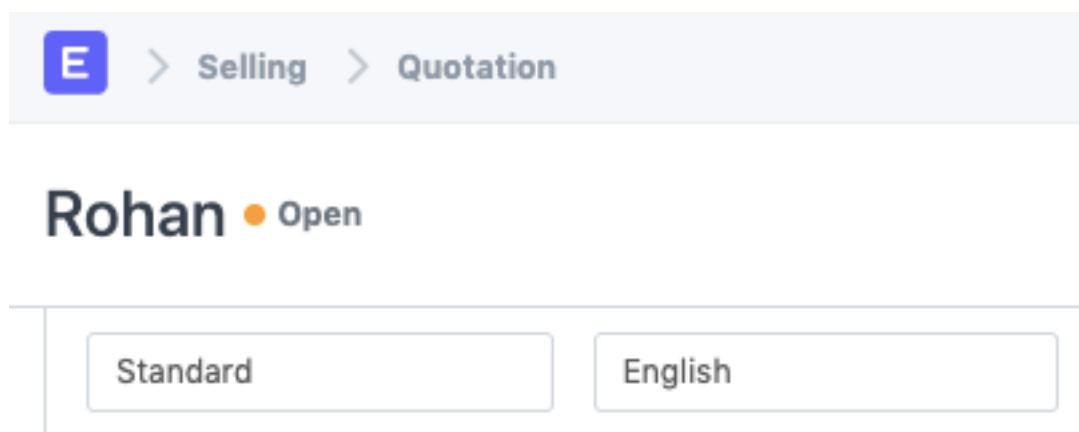
| ID         | Name       | Status | Last Modified On |
|------------|------------|--------|------------------|
| 39e09b9735 | 39e09b9735 | Sent   | 4 M              |
| d10adc500c | d10adc500c | Sent   | 4 M              |



The following options are available when sending an Email.

- **CC:** Carbon Copy of the email. Useful when you want to keep someone in the conversation loop but don't want to address the email directly to them.
- **BCC:** Blind Carbon Copy is similar to CC but everyone else on the email thread cannot see that the mail was also sent to the BCC recipients. This is useful to hide the email address of certain people if you're sending the email to a lot of people who don't necessarily know each other.
- **Email Template:** You can create preset templates to send out standard replies. Email Templates are already available in the system for Dispatch Notification, Leave Status Notification, and Leave Approval Notification. You can set a Default Email Template via [Customize Form](#).
- **Send me a copy:** This will send a copy to your email address. It's useful to ensure that the email was sent without any errors.
- **Send Read Receipt:** Ticking this checkbox will send you a notification if the receiver has read the email. In case of multiple receivers, even if one has read the email, you'll get a notification.
- **Attach Document Print:** Attach the PDF of the document you're sending via email.
- **Select Attachments:** Any additional attachments can be added here.

The following two fields are the fields which appear on the print screen:



The screenshot shows a navigation bar with a blue square containing the letter 'E', followed by a right arrow, the word 'Selling', another right arrow, and the word 'Quotation'. Below this is a large heading 'Rohan' followed by a small orange circle and the word 'Open'. Underneath, there are two rectangular buttons: 'Standard' and 'English'.

- **Select Print Format:** The print format of the document. Know more about Print Format [here](#).
- **Select Languages:** The language in which the PDF is to be generated.

## ➤ Linking Emails to Documents

**An email can be linked to multiple documents in ERP.**

This can be done in the following two ways:

- Email Aggregation in Contact, Customer, Supplier.
- Automatic Email Linking.

### 1. Email Aggregation for Customer and Supplier

Email Aggregation takes place in Contact, Customer, and Supplier. All the Emails sent or received from a Contact can be viewed in that Contact's Timeline and as well as linked Customer's or Supplier's Timeline. To enable Email Aggregation, do the following:

1. In a Contact, add Links for the Customer or Supplier respectively.

E

> Contact

Search or type a command (Ctrl + G)

Q

A

Settings

Help

15

Test Contact-Test Customer

Passive

Menu

Save

TC

Comments

0

Assigned To

Assign

+

Attachments

Attach File

+

Tags

Add a tag ...

Reviews

+

Shared With

+

You edited this

a minute ago

First Name

Test Contact

Last Name

Email Address

User Id

Status

Passive

Salutation

Gender

Phone

Mobile No

REFERENCE

Is Primary Contact

Links

|   | Link DocType | Link Name     | Link Title    |  |
|---|--------------|---------------|---------------|--|
| 1 | Customer     | Test Customer | Test Customer |  |

Add Row

- Now when an Email is sent to or received from the Contact associated with Customer or Supplier, that email is linked to the Customer or Supplier mentioned in the Links section of the Contact.

E

> Contact

Search or type a command (Ctrl + G)

Q

A

Settings

Help

22

Test Contact-Test Customer

Passive

Menu

Save

Add a comment

Comment

Ctrl+Enter to add comment

New Email

New Event

Admin - Details - a few seconds ago

Title: Re: Test Email

Test Email

Admin - Details - 18 hours ago

Title: Test Email

## 2. Automatic Email Linking to a Document

Automatic Email Linking links an Email to the Document specified in the unique Email Address generated by the system for a document. If an Email is sent or received using the unique Email Address, the system will link that Email to the Document.

- Enable Automatic Email Linking in Email Account. This feature can be used only with one Email Account at a time.

MAN ENERGY

- 93 -

P.O.Box 128448, Dubai, United Arab Emirates  
man.energy

E

> Email Account

Search or type a command (Ctrl + G)

Q

A

Settings

Help

22

Support

Inbox

Add a tag ...

Reviews

Shared With

You edited this a few seconds ago

You created this 18 hours ago

Use ASCII encoding for password

Domain

gmail.com

Enable Incoming

Check this to pull emails from your mailbox

Append To

Issue

Append as communication against this DocType (must have fields, "Status", "Subject")

Default Incoming

e.g. replies@yourcomany.com. All replies will come to this inbox.

Email Sync Option

UNSEEN

Initial Sync Count

250

Total number of emails to sync in initial sync process

Enable Automatic Linking in Documents

- Once this feature has been enabled, you will see a unique Email ID generated using the Email ID mentioned in the Email Account.
- Now you can copy the Email ID by clicking on it and you can send or receive Emails using the unique Email ID. If an Email contains this unique Email ID either in the Recipients, Cc or Bcc, section, the system will link that Email to the specified Document.

E

> Email Account

Search or type a command (Ctrl + G)

Q

A

Settings

Help

22

Support

Inbox

You edited this 4 minutes ago

You created this 18 hours ago

Check this to pull emails from your mailbox

Append To

Issue

Append as communication against this DocType (must have fields, "Status", "Subject")

Default Incoming

e.g. replies@yourcomany.com. All replies will come to this inbox.

Email Sync Option

UNSEEN

Initial Sync Count

250

Total number of emails to sync in initial sync process

Enable Automatic Linking in Documents

Notify if unreplied

Enable Outgoing

SMTP Settings for outgoing emails


Send unsubscribe message in email

Track Email Status

## ➤ Email Digest

Email Digests allow you to get regular updates about your sales, expenses and other critical numbers directly in your Email Inbox.

P.O.Box 128448, Dubai, United Arab Emirates  
man.energy



- 94 -

مسان الطاقة  
MAN ENERGY

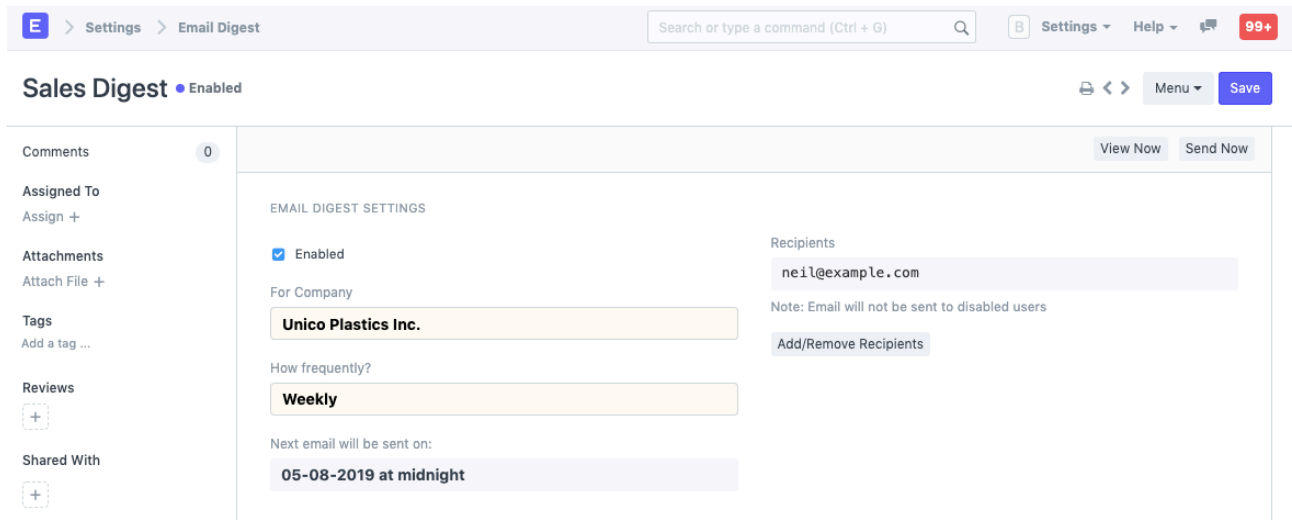
Email Digests are a great way for top managers to keep track of the big numbers like “Sales Booked” or “Amount Collected” or “Invoices Raised” etc.

To set up Email Digest, go to:

Home > Settings > Email Digest

1. Enter a name for the Email digest.
2. Set the frequency of mails to be sent.
3. Add or remove recipients.
4. Select the items to be included in the digest.
5. Save.

Example:



## ➤ Auto Email Reports

**Auto Email Reports** automatically sends reports for the selected document.

You can setup **Auto Email Report** to send reports at regular intervals. These must be saved reports of any type (Report Builder, Script or Query Report).

You can find Auto Email Report at:

Home > Settings > Auto Email Report

### 1. How to create an Auto Email Report

1. Go to the Auto Email Report list, click on New.
2. Select the Report for which you want to generate emails.
3. Select the user for which you want to create this report (permissions will apply for this user).
4. Set the Email Addresses to which you want this report to be emailed and the frequency of the report. Emails will be sent at midnight. The date will be repeated in case of weekly/monthly/yearly frequency. For example, if the selected date is 7 and the frequency is monthly, the email will be sent on the 7th of each month.

E

> Auto Email Report

Search or type a command (Ctrl + G)

Settings Help 99+

Lost Opportunity

Enabled

Download Send Now

Comments 0

Assigned To Assign +

Attachments Attach File +

Tags Add a tag ...

Reviews +

Shared With +

You edited this a few seconds ago

You created this a few seconds ago

Report

Report Type

Based on Permissions For User

abc@example.com

Enabled

FILTER DATA

Send only if there is any data

Only Send Records Updated in Last X Hours

0

Zero means send records updated at anytime

No of Rows (Max 500)

100

5. Save.

You can test the report by clicking on "Download" or "Send Now". Here is an example of the email you will receive for a general ledger report:

General Ledger

Inbox x

Notifications <frappetest@gmail.com>

to prasad

General Ledger

|   | Item                 | Item Name  | Apr (Qty) | Apr (Amt) | May (Qty) | May (Amt) | Jun (Qty) | Jun (Amt) | Jul (Qty) | Jul (Amt)  | Aug (Qty) | Aug (Amt)  | Sep (Qty) | Sep (Amt) |
|---|----------------------|--|-----------|-----------|-----------|-----------|-----------|-----------|-----------|------------|-----------|------------|-----------|-----------|
| 1 |                      | Ubuntu Testing   | 0         | 0.00      | 0         | 0.00      | 0         | 0.00      | 0         | 0.00       | 0         | 0.00       | 1         | 7,000.00  |
| 2 | 5 MP Camera          | 5 MP Camera  | 0         | 0.00      | 0         | 0.00      | 0         | 0.00      | 0         | 0.00       | 2         | 2,000.00   | 0         | 0.00      |
| 3 | Air cooler           | Air cooler   | 0         | 0.00      | 0         | 0.00      | 0         | 0.00      | 0         | 0.00       | 1         | 0.00       | 0         | 0.00      |
| 4 | Apple iMac ME086HN/A | Apple iMac ME086HN/A All-in-One (Quad Core i5/ 8GB/ 1TB/ OS X Mavericks) | 0         | 0.00      | 0         | 0.00      | 0         | 0.00      | 2         | 200,000.00 | 2         | 200,000.00 | 0         | 0.00      |
| 5 | Battery 2300 mAh     | Battery 2300 mAh   | 0         | 0.00      | 0         | 0.00      | 0         | 0.00      | 0         | 0.00       | 0         | 0.00       | 0         | 0.00      |

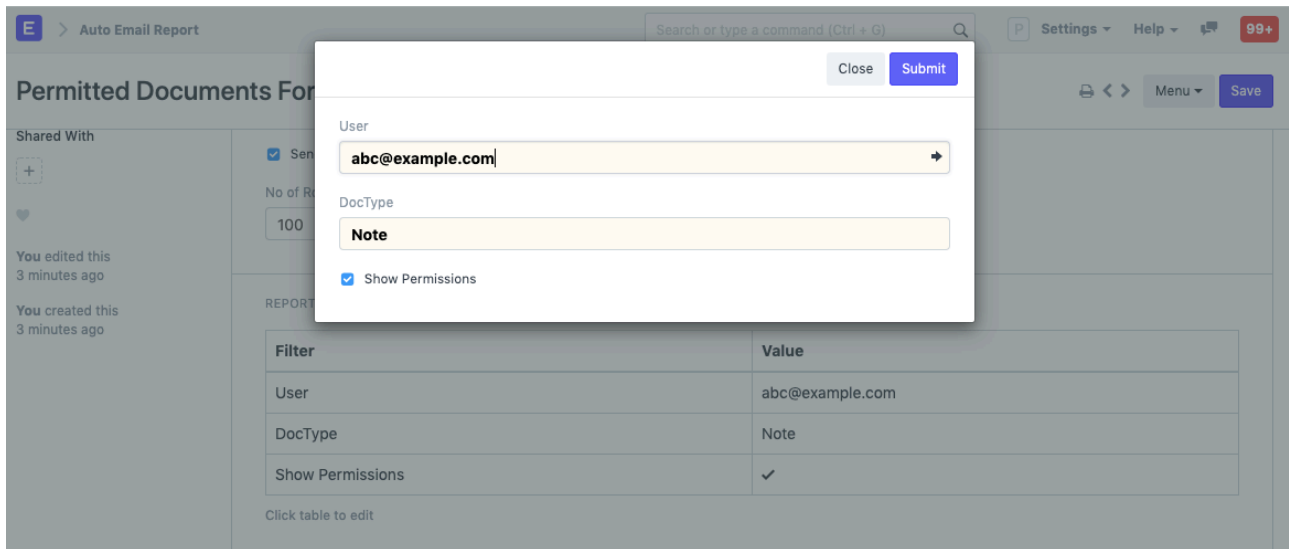
## 2. Features

### 2.1 Filter Data

- Send only if there is any data:** If enabled, emails will not be sent if there is no data in the report.
- Only Send Records Updated in Last X Hours:** If set to 24, an email will contain only records updated in the last 24 hours.
- No of Rows:** The number of rows to be sent in the email. The maximum is 500.

### 2.2 Report Filters

If your report has filters, you will be able to see them. Click on the table to edit it:



| Filter           | Value           |
|------------------|-----------------|
| User             | abc@example.com |
| DocType          | Note            |
| Show Permissions | ✓               |

For example, if the email is on the report 'Project Billing Summary' select the Project. The date range here is the date range of the 'Project Billing Summary'.

### 2.3 Message

A message can also be added to be sent with the email report. For example, 'This is your monthly Project Billing Summary Report:'

You can also change the file format in which the report is created. The available options are HTML, XLSX, and CSV.

### ➤ SMS Settings

**You can subscribe to an SMS provider to send SMS to mobile numbers.**

To integrate SMS in ERP, approach an SMS Gateway Provider who provides HTTP API. They will create an account for you and will provide a unique username and password.

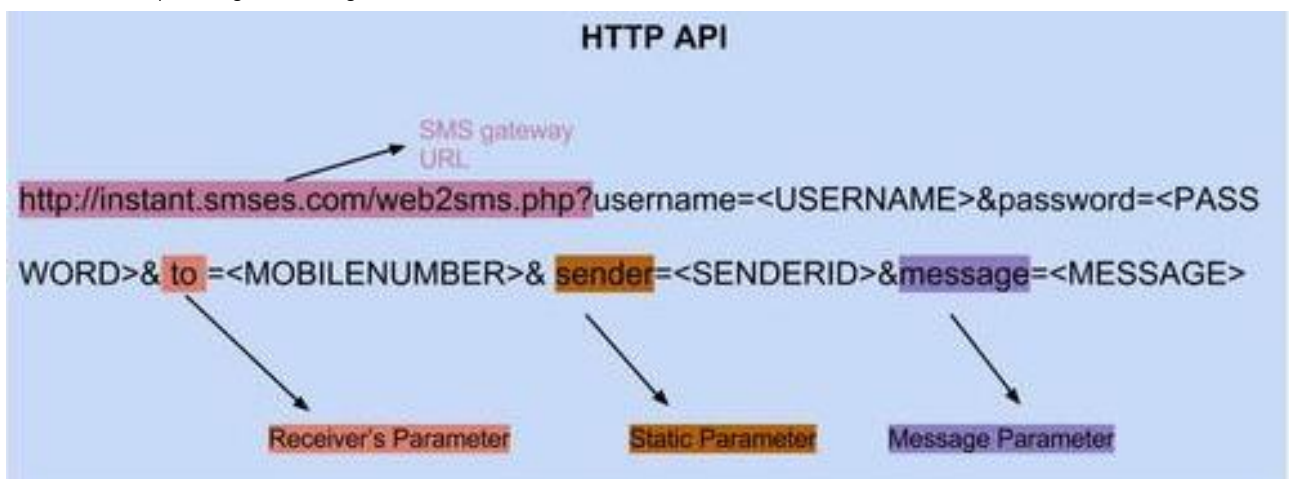
To access SMS settings, go to:

Home > Settings > SMS Settings

To configure SMS Settings in ERP, find out their HTTP API (a document which describes the method of accessing their SMS interface from 3rd party applications). In this document, you will get a URL which is used to send the SMS using HTTP request. Using this URL, you can configure SMS Settings in ERP.

Example SMS Gateway URL:

`http://instant.smses.com/web2sms.php?username=<username>&password=<password>&to=<mobilenumber>&sender=<senderid>&message=<message>`



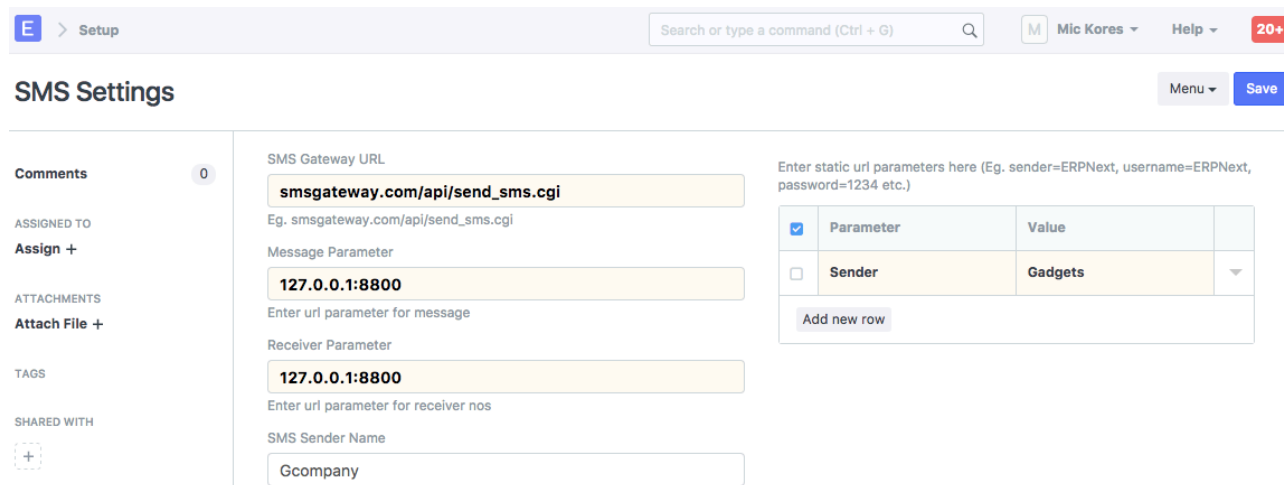
Note: For SMS Gateway URL, only include the string before the "?".

Example:

`http://instant.smses.com/web2sms.php?username=abcd&password=abcd&to=9900XXXXXX&sender=DEMO&message=THIS+IS+A+TEST+SMS`

The above URL will send SMS from account abcd to mobile number 9900XXXXXX with sender ID as DEMO with a text message as "THIS IS A TEST SMS".

Note that some parameters in the URL are static. You will get static values from your SMS Provider like username, password, etc. These static values should be entered in the Static Parameters table.



**SMS Settings**

**Comments** 0

**ASSIGNED TO**  
**Assign +**

**ATTACHMENTS**  
**Attach File +**

**TAGS**

**SHARED WITH**  
**+**

**SMS Gateway URL**  
  
 Eg. smsgateway.com/api/send\_sms.cgi

**Message Parameter**  
  
 Enter url parameter for message

**Receiver Parameter**  
  
 Enter url parameter for receiver nos

**SMS Sender Name**

Enter static url parameters here (Eg. sender=ERPNext, username=ERPNext, password=1234 etc.)

| <input checked="" type="checkbox"/> | Parameter | Value   |   |
|-------------------------------------|-----------|---------|---|
| <input type="checkbox"/>            | Sender    | Gadgets | ▼ |

**Add new row**

### How to configure ERP with Voip.ms

The first step is to login to voip.ms account. Then go **Main menu, SOAP and REST/JSON API**. Enable the API, set a password and whitelist your server ip address.

Then go to DID's and enable SMS on the number SMS will be sent from.

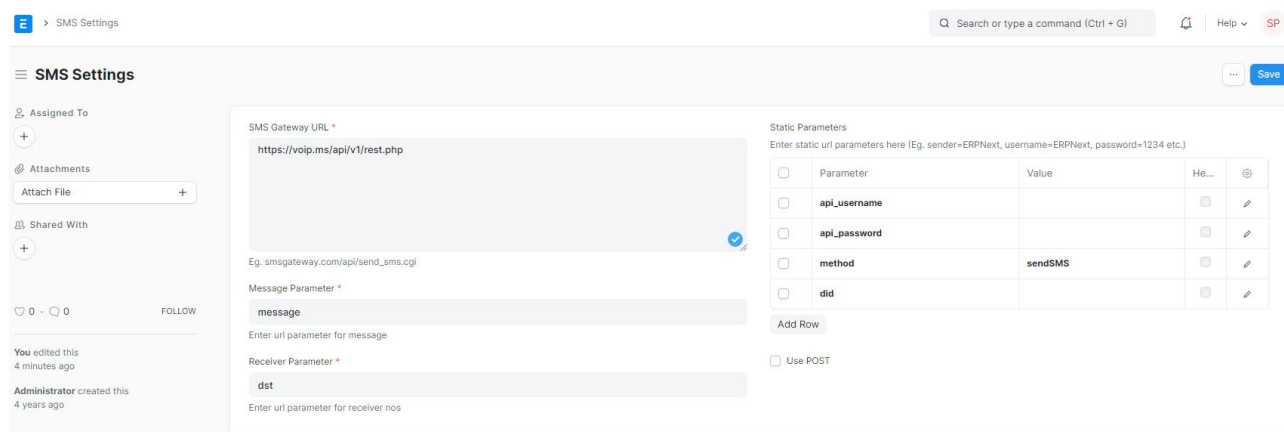
Set SMS Gateway to **`https://voip.ms/api/v1/rest.php`**

Set Message Parameter to **message**

Receiver Parameter to **dst**

Create 4 new Static Parameters:

- **api\_username** (voip.ms account username)
- **api\_password** (the API password configured few minutes ago)
- **method** set value to **sendSMS**
- **did** (the 10 digits DID that will be used to send the sms)



**SMS Settings**

**Assigned To**  
**+**

**Attachments**  
**Attach File +**

**Shared With**  
**+**

**SMS Gateway URL \***  
  
 Eg. smsgateway.com/api/send\_sms.cgi

**Message Parameter \***  
  
 Enter url parameter for message

**Receiver Parameter \***  
  
 Enter url parameter for receiver nos

**Static Parameters**  
 Enter static url parameters here (Eg. sender=ERPNext, username=ERPNext, password=1234 etc.)

| <input type="checkbox"/> | Parameter    | Value   | He... |  |
|--------------------------|--------------|---------|-------|--|
| <input type="checkbox"/> | api_username |         |       |  |
| <input type="checkbox"/> | api_password |         |       |  |
| <input type="checkbox"/> | method       | sendSMS |       |  |
| <input type="checkbox"/> | did          |         |       |  |

**Add Row**

☐ Use POST

Then go to SMS Center to test if everything works properly.

## ➤ Notification

You can configure various notifications in your system to remind you of important activities.

1. The completion date of a Task.
2. Expected Delivery Date of a Sales Order.
3. Expected Payment Date.
4. A reminder of follow up.
5. If an Order greater than a particular value is received or sent.
6. Expiry notification for a Contract.
7. Completion/Status change of a Task.

To access notification setup, go to:

Home > Settings > Notification

### 1. Setting Up An Alert

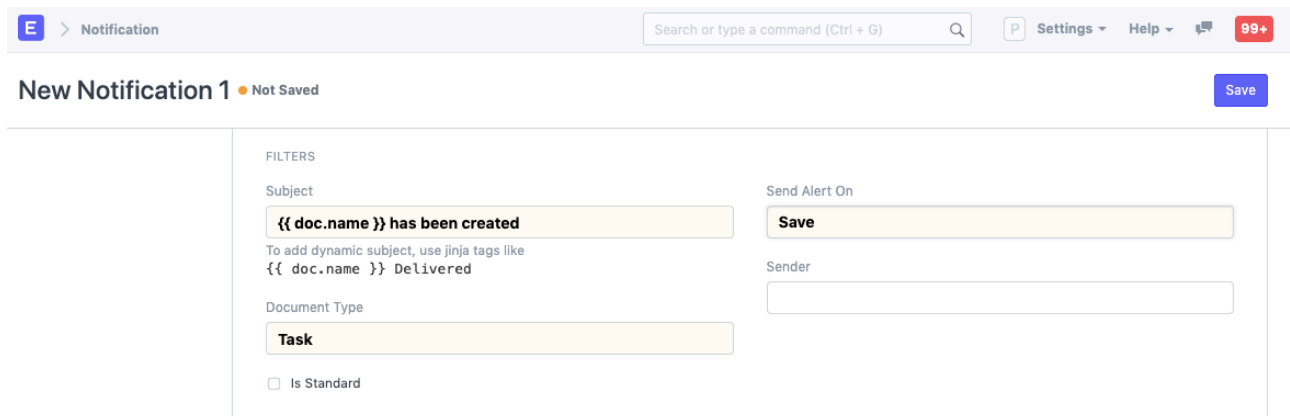
To set up a Notification:

1. Select the Document Type you want to watch changes on.
2. Define what events you want to watch under Send Alert On. Events are:
  1. New: When a new document of the selected type is made.
  2. Save/Submit/Cancel: When a document of the selected type is saved, submitted, or canceled.
  3. Days Before/Days After: Trigger this alert a few days before or after the **Reference Date**. To set the days, set **Days Before or After**. This can be useful in reminding you of upcoming due dates or reminding you to follow up on certain leads of quotations.
  4. Value Change: When a particular value in the selected type changes.
  5. Method: Sends notification when a specific method is triggered. Eg: before\_insert.
  6. Custom: Send a notification to an [Email Account](#) selected.
3. Set additional Conditions if required.
4. Set the recipients of this alert. The recipient could either be a field of the document or a list of fixed Email Addresses.
5. Compose the message.
6. Save.

#### 1.1 Setting a Subject

You can retrieve the data for a particular field by using doc.[field\_name]. To use it in your subject/message, you have to surround it with {% raw %}{{ }}{% endraw %}. These are called [Jinja](#) tags. For example, to get the name of a document, you use {% raw %}{{ doc.name }}{% endraw %}.

The following example sends an email on saving a Task with the Subject, "TASK#### has been created"



**Notification** Search or type a command (Ctrl + G) Settings Help 99+

**New Notification 1** Not Saved Save

**FILTERS**

Subject  
  
 To add dynamic subject, use jinja tags like {{ doc.name }} Delivered

Document Type

☐ Is Standard

**Send Alert On**

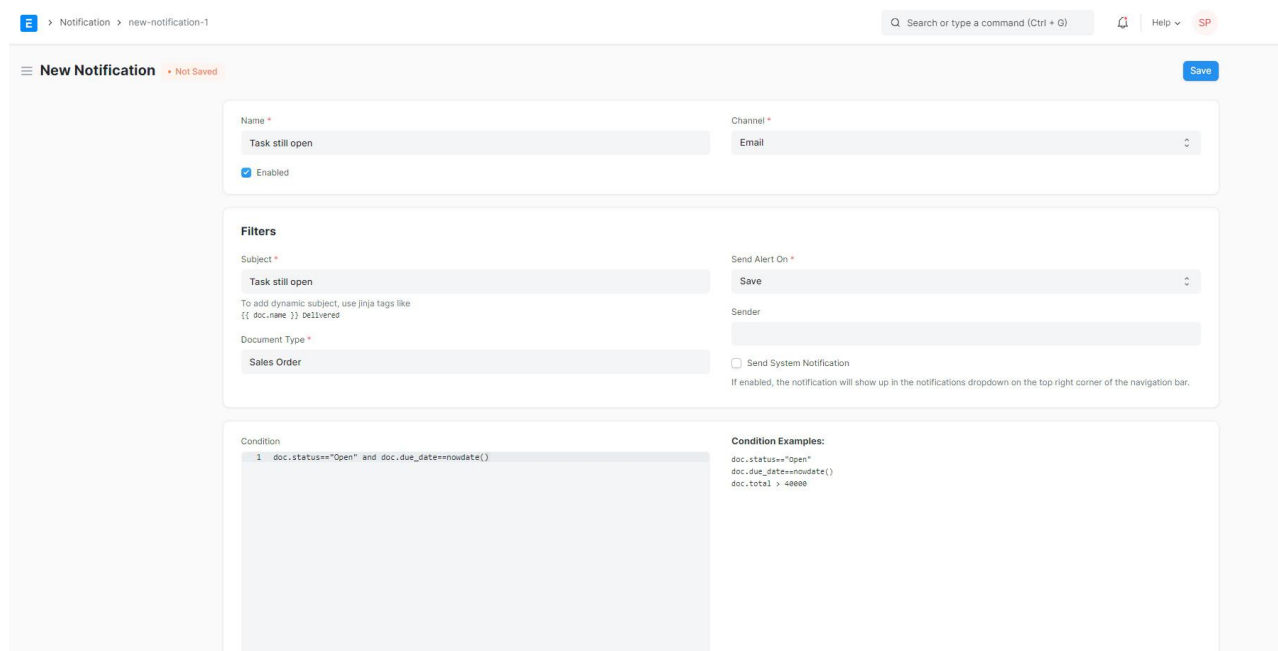
Sender

#### 1.2 Setting Conditions

Notifications allow you to set conditions according to the field data in your documents. For example, if you want to receive an Email if a Lead has been saved as "Interested" as it's status, you put doc.status == "Interested" in the conditions textbox. You can also set more complex



conditions by combining them with the operator **and** or **or**.



The above example will send a Notification when a Task is saved with the status "Open" and the "Expected End Date" for the Task is the date on or before the date on which it was saved on.

### 1.3 Setting a Message

You can use both Jinja Tags (`{{ doc.[field_name] }}`) and HTML tags in the message textbox.

`{{ doc.[field_name] }}` Order Overdue

Transaction `{{ doc.name }}` has exceeded Due Date. Please take necessary action.

`<!-- show last comment -->`

`{{ if comments }}`

Last comment: `{{ comments[-1].comment }}` by `{{ comments[-1].by }}`

`{{ endif }}`

`<h4>Details</h4>`

`<ul>`

`<li>Customer: {{ doc.customer }}`

`</li><li>Amount: {{ doc.total_amount }}`

`</li></ul>{{ endraw }}`

### 1.4 Setting a Value after the Alert is Set

Sometimes to make sure that the Notification is not sent multiple times, you can define a custom property (via Customize Form) like "Notification Sent" and then set this property after the alert is sent by setting the **Set Property After Alert** field.

Then you can use that as a condition in the **Condition** rules to ensure emails are not sent multiple times

E > Notification

Search or type a command (Ctrl + G)

P Settings Help 99+

New Notification 1

Not Saved

Save

#### FILTERS

Subject

{{ doc.name }} has been created

To add dynamic subject, use jinja tags like  
{{ doc.name }} Delivered

Document Type

Task

☐ Is Standard

Send Alert On

Save

Sender

### 1.5 Example

- Defining Criteria

the

E > Notification

Search or type a command (Ctrl + G)

P Settings Help 99+

Event Reminder

Enabled

< > Menu Save

Tags

Add a tag ...

Reviews

+

Shared With

+

♥

You edited this a few seconds ago

You created this a few seconds ago

FILTERS

Subject

Event Reminder

To add dynamic subject, use jinja tags like  
{{ doc.name }} Delivered

Document Type

Event

☐ Is Standard

Send Alert On

Days Before

Reference Date

starts\_on (Starts on)

Send alert if date matches this field's value

Days Before or After

3

Send days before or after the reference date

Sender

- Setting the Recipients and Message

E > Notification

Search or type a command (Ctrl + G)

P Settings Help 99+

Event Reminder

Not Saved

< > Menu Save

RECIPIENTS

Recipients

| <input type="checkbox"/>   | Email By Document Field | Email By Role | CC | Condition |  |
|----------------------------|-------------------------|---------------|----|-----------|--|
| <input type="checkbox"/> 1 | owner                   | All           |    |           |  |

Add Row

MESSAGE

Message

1 Reminder for upcoming event.

- 

## 2. Slack Notifications

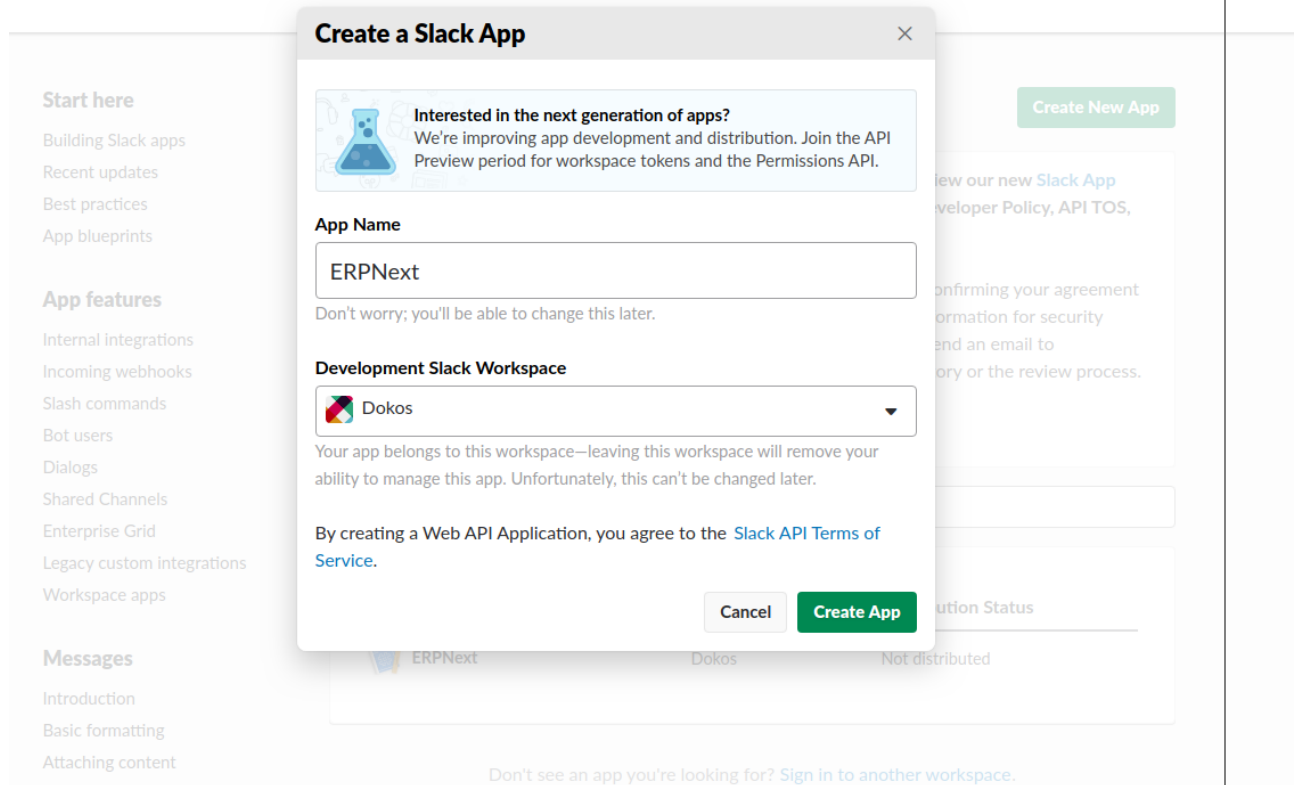
If you prefer to have your notifications sent to a dedicated Slack channel, you can also choose the option "Slack" in the channel options and select the appropriate Slack Webhook URL.

## 2.1 Slack Webhook URL


A Slack webhook URL is a URL pointing directly to a Slack channel.

To generate webhook URLs, you need to create a new Slack App:

1. Go to <https://api.slack.com/slack-apps>.
2. Click on "Create a Slack App".



- 3.
4. Give your App a name and choose the right workspace. Once your app is created, go to the "Incoming Webhooks" section and add a new Webhook to Workspace.



**Settings**

- Basic Information
- Collaborators
- Install App
- Manage Distribution

**Features**

- Incoming Webhooks
- Interactive Components
- Slash Commands
- OAuth & Permissions
- Event Subscriptions
- Bot Users
- User ID Translation

**Slack** ♥

- Help
- Contact
- Policies
- Our Blog

## Incoming Webhooks

### Activate Incoming Webhooks

On

Incoming webhooks are a simple way to post messages from external sources into Slack. They make use of normal HTTP requests with a JSON payload, which includes the message and a few other optional details. You can include [message attachments](#) to display richly-formatted messages.

Each time your app is installed, a new Webhook URL will be generated.

If you deactivate incoming webhooks, new Webhook URLs will not be generated when your app is installed to your team. If you'd like to remove access to existing Webhook URLs, you will need to [Revoke All OAuth Tokens](#).

### Webhook URLs for Your Workspace

To dispatch messages with your webhook URL, send your [message](#) in JSON as the body of an `application/json` POST request.

Add this webhook to your workspace below to activate this curl example.

**Sample curl request to post to a channel:**

```
curl -X POST -H 'Content-type: application/json' --data '{"text":"Hello, World!"}' https://hooks.slack.com/services/
```

| Webhook URL   | Channel | Added By   |
|---|---------|--|
| <a href="https://hooks.slack.com/services/">https://hooks.slack.com/services/</a> <div style="float: right; border: 1px solid #ccc; padding: 2px 5px;">Copy</div> | #test   | <a href="#">chdecultot</a><br>May 22, 2018 <div style="float: right; cursor: pointer;">✕</div> |

Add New Webhook to Workspace

5.

6. Copy the created link, go back to ERP and use it to create a new Slack Webhook URL in Integrations > Slack Webhook URL.

### Test Channel

Menu

Save

**Comments** 0

ASSIGNED TO

Assign +

Webhook URL

<https://hooks.slack.com/services/>

7. Select Slack and your Slack channel in the channel and Slack channel fields within your notification

## 2.2 Message Format

Unlike Email messages, Slack doesn't allow HTML formatting.

Instead, you can use markdown formatting: [Slack Documentation](#)

Example: {% raw %} *Order Overdue*

Transaction {{ doc.name }} has exceeded Due Date. Please take the necessary action.

{% if comments %}

Last comment: {{ comments[-1].comment }} by {{ comments[-1].by }}

{% endif %}

\*Details\*

- Customer: {{ doc.customer }}
  - Amount: {{ doc.grand\_total }}
- {% endraw %}



ERPNext APP 4:35 PM

## Order Overdue

Transaction SINV-00010 has exceeded Due Date. Please take necessary action.

### Details

- Customer: Test Customer
- Amount: 50.0

[Go to the document](#)

### 3. System Notifications

In **Version 12** we introduced System notifications for **Assignments**, **mentions**, **documents shared**, and **Energy Points**. These notifications show up in the notifications dropdown on the the navigation bar's top right corner.

In **Version 13** we have introduced an additional channel to send alerts - **System Notifications**:

E > Settings > Notification

Search or type a command (Ctrl + G)

Settings Help

test trigger doc events

Menu

Save

Comments 0

Assigned To Assign +

Attachments Attach File +

Tags Add a tag ...

Reviews +

Shared With +

Enabled

Channel

System Notification

FILTERS

Subject

<b>{{ doc.name }}</b> Submitted

To add dynamic subject, use jinja tags like {{ doc.name }} Delivered

Document Type

Sales Invoice




Is Standard

Send Alert On








Submit

Sender




Choosing this channel will send a system notification when a notification is triggered, instead of an Email or a Slack notification.



and (Ctrl + G)   **Settings** ▾ **Help** ▾ 

**Notifications** ^ Mark all as Read Settings

-  **SINV-00256 Submitted**  
13 h
-  **SINV-00258 Submitted**  
13 h
-  **frappe** mentioned you in a comment in **Issue how are you**  
13 h
-  **You gained 50 points for issue points fw**  
16 h
-  **Administrator** assigned a new task **Issue how are you** to you  
2 d
-  **Administrator** assigned a new task **Issue Upcoming Events for Today** to you  
2 d
-  **Administrator** assigned a new task **Issue hi** to you

Clicking on the notification routes to the **Notification Log** document which contains the configured subject, message as well as the attached file, if Attach Print is set:

**E** > Tools > Notification Log Search or type a command (Ctrl + G)   **Settings** ▾ **Help** ▾ 


**SINV-00256 Submitted** 4229079aa9  

Subject  
**SINV-00256 Submitted**

Message  
**Order Overdue**  
Transaction SINV-00256 has exceeded Due Date. Please take necessary action.

**Details**

- Customer: Latte Solutions
- Amount: 0.0

 SINV-00256.pdf  
[Open Reference Document](#)

If Email/Slack alerts and System Notifications both are required, the main channel can be set as Email or Slack and this option can be checked:

E

Settings > Notification

Search or type a command (Ctrl + G)

Settings Help

test trigger doc events

Menu

Save

Comments 0

Assigned To Assign +

Attachments Attach File +

Tags Add a tag ...

Reviews +

Shared With +

Enabled

Channel Email

FILTERS

Subject

<b>{{ doc.name }}</b> Submitted

To add dynamic subject, use Jinja tags like {{ doc.name }} Delivered

Document Type

Sales Invoice

Is Standard

Send Alert On

Submit

Sender

Send System Notification

If enabled, the notification will show up in the notifications dropdown on the top right corner of the navigation bar.

#### 4. WhatsApp

In Version 13 we have introduced an additional channel to send alerts

- WhatsApp:

E

Settings > Notification

Search or type a command (Ctrl + G)

Settings Help

test trigger doc events

Menu

Save

Comments 0

Assigned To Assign +

Attachments Attach File +

Tags

Enabled

Channel WhatsApp

Twilio Number 99993344

To use WhatsApp for Business, initialize Twilio Settings.

If you prefer to have your notifications sent to a WhatsApp number, you can also choose the option "WhatsApp" in the channel options and select the appropriate Twilio Number. Twilio Numbers can be added to Twilio settings in Frappe. WhatsApp messages can only be sent to numbers which have country codes in them.

E

Integrations

Search or type a command (Ctrl + G)

Settings Help

test trigger doc events

Menu

Save

Comments 0

Assigned To Assign +

Attachments Attach File +

Tags

Shared With +

Enabled

Twilio Number

Account SID AC542d89cb310ae62c55b3eae5cca96e4d

Auth Token .....

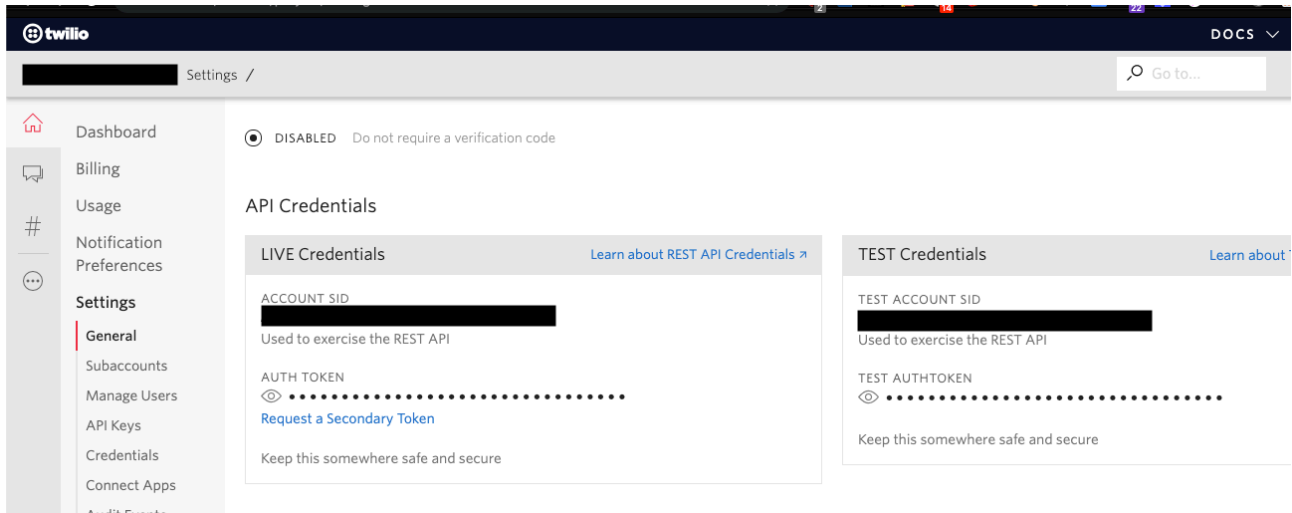
Twilio Number

| Phone Number |  |
|--------------|--|
| 9832131422   |  |
| 99993344     |  |

Add Row

#### 4.1 Twilio Settings

In order to configure Twilio settings, you need to first obtain Twilio credentials from your Twilio Account's account settings. You can only add those phone numbers that have been activated in your Twilio Account with WhatsApp access.



The screenshot shows the Twilio console 'API Credentials' page. It is divided into two main sections: 'LIVE Credentials' and 'TEST Credentials'. Both sections show a disabled state with a 'Do not require a verification code' option. The 'LIVE Credentials' section displays an 'ACCOUNT SID' and an 'AUTH TOKEN' (masked with dots). The 'TEST Credentials' section displays a 'TEST ACCOUNT SID' and a 'TEST AUTHTOKEN' (also masked). Both sections include a 'Request a Secondary Token' link and a warning to 'Keep this somewhere safe and secure'.

## 4.2 Message Format

WhatsApp allows their users to only send those message templates that are pre-approved by them to your customers. Failure to do so might result in restrictions on your Twilio account.

**Warning: Only Use Pre-Approved WhatsApp for Business Template**

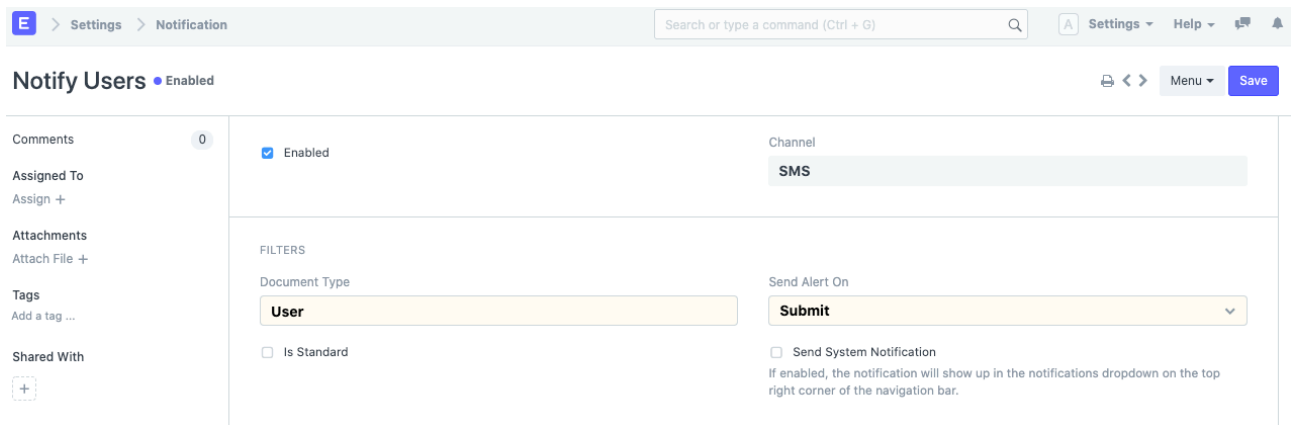
### Message Example

Your appointment is coming up on {{ doc.date }} at {{ doc.time }}

[View Properties \(via Customize Form\)](#)

## 5. SMS

We have introduced an additional channel to send alerts - **SMS**:



The screenshot shows the 'Notify Users' configuration page for the 'SMS' channel. The 'Channel' is set to 'SMS'. Under 'FILTERS', the 'Document Type' is set to 'User'. The 'Send Alert On' dropdown is set to 'Submit'. There is a checkbox for 'Is Standard' which is currently unchecked. A note states: 'If enabled, the notification will show up in the notifications dropdown on the top right corner of the navigation bar.' The page includes a 'Save' button and a 'Menu' dropdown.

In order to use this channel, you would need to complete the configuration of [SMS Settings](#).

## > Document Follow

Document Follow is a feature that allows users to track changes in documents via email notifications.

### 1. How to Activate Document Follow

1. Go to: **Settings > My Settings**.
2. In the Document Follow section, tick the 'Send Notifications for documents followed by me' checkbox.
3. Set the frequency at which you want to receive emails.
4. Now, you can receive emails for the documents you follow.

#### 1.1 How to Follow documents



1. Go to any document, you'll see an option to follow the document.
2. Click on 'Follow'.

E
>
Selling
>
Quotation

Search or type

**erpnext** ● Draft

---

**Attachments**  
Attach File +

**Tags**  
Add a tag ...

**Reviews**  
+

**Shared With**  
+

♥

Follow

**You edited this**  
3 days ago

**You created this**  
3 days ago

DASHBOARD ▾

**Quotation To**

Customer

**Customer**

erpnext

---

ADDRESS AND CONTACT ▾

---

CURRENCY AND PRICE LIST ▾

1. After following, you can also unfollow a document.
2. Note that you can only follow documents for which track changes are on.
3. To enable track changes, go to **Menu > Customize > tick the Track Changes checkbox**.

### 1.2 Automatic Follow

Cases where the document will be **automatically** followed after activating Document Follow:

- When you create a new document.
- When you modify a document.
- When you like a document using the heart icon.
- When another user shares a document with you or assigns you to a document, you'll be following the document.

This is what an email notification for Document Follow will look like:

## Document Follow Notification ➤ Inbox x



**Notifications** <frappetest5@gmail.com>  
to me ▾

Mon, May 20, 3:34 PM ☆ ↶ ⋮

### Document Follow Notification

[Purchase Order: PUR-ORD-2019-00007](#)

11:44 AM: Table Field: "items" Row# 0 Field: "qty" changed from "1" to "5" By: [basawaraj@erpnext.com](mailto:basawaraj@erpnext.com)

11:44 AM: Table Field: "payment\_schedule" Row# 0 Field: "payment\_amount" changed from "€ 500.00" to "€ 2,500.00" By: [basawaraj@erpnext.com](mailto:basawaraj@erpnext.com)

## ➤ Email Dropbox

When you receive emails from Leads, Customers, Suppliers, or other business partners, you might wish to attach those to their relevant records in ERP. One way to do so is to save the email and upload it as an attachment. However, this could turn into a cumbersome process. ERP offers a better way to handle this through its "Email Dropbox" feature.

When enabled, each record in ERP will have its own unique email address to which you can forward emails. You can click on the email address to copy it to your clipboard, which can then be added to the "To", "Cc", or "Bcc" field of the email that you wish to send.

### 1. Enable Email Dropbox Feature

In [Email Account](#), check 'Enable Email Dropbox'.

E

Settings

Email Account

Search or type a command (Ctrl + G)

Settings

Help

46

Notifications

• Default Sending

Menu

Save

☐ Default Incoming  
e.g. replies@yourcompany.com. All replies will come to this inbox.  
  
Email Sync Option  

UNSEEN

  
  
Initial Sync Count  

250

  
Total number of emails to sync in initial sync process

☒ Enable Email Dropbox  
For more information, click here.

☐ Notify if unreplied

☒ Enable Outgoing  
SMTP Settings for outgoing emails  
  
☒ Default Outgoing  
Notifications and bulk mails will be sent from this outgoing server.  
  
☐ Always use Account's Email Address as Sender  
Uses the Email Address mentioned in this Account as the Sender for all emails sent using this Account.  
  
☐ Always use Account's Name as Sender's Name  
Uses the Email Address Name mentioned in this Account as the Sender's Name for all emails sent using this Account.

### 2. Copy Unique Email Address in Any Record

Once the Email Dropbox feature is enabled, the unique email address becomes visible in all the records. You can click on the same and the address is copied to your clipboard. You can directly paste it in 'To', 'Cc' or 'Bcc' and send the email.

E

Search or type a command (Ctrl + G)

Settings Help 48

Innovative Solutions Pvt Ltd • Lead CRM-LEAD-2019-00012 Menu Save

a few seconds ago

NOTES

ADDRESS & CONTACT

MORE INFORMATION

Add a comment

Comment

Ctrl+Enter to add comment

New Email New Event

Send an email to **frappetest5+Lead+CRM-LEAD-2019-00012@gmail.com** to link it here.

You created – a few seconds ago

### 3. Email in Timeline

Once the email is received, ERP attaches it to the appropriate record and it will be visible in that record's timeline.

E > CRM > Lead

Search or type a command (Ctrl + G)

Settings Help 49

Innovative Solutions Pvt Ltd • Lead CRM-LEAD-2019-00012 Menu Save

Ctrl+Enter to add comment

New Email New Event

Send an email to **frappetest5+Lead+CRM-LEAD-2019-00012@gmail.com** to link it here.

B

Basawaraj Savalagi – Details – 14 minutes ago

Title: Design Documents

Hello,

As discussed, please find attached the design documents.

Thanks

--

Basawaraj

+91 83106 74227

Frappe Technologies Pvt. Ltd.

Design Document.pdf

Reply All Reply

You created – 16 minutes ago

## SYSTEM CONFIGURATION

### ➤ Settings

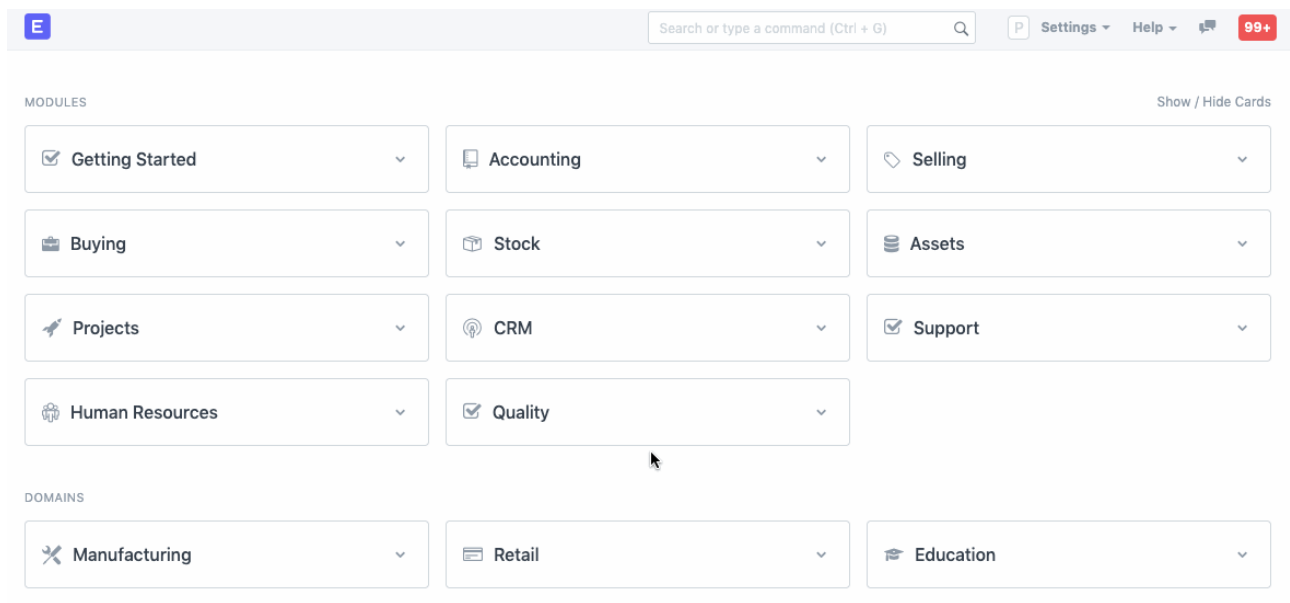
In Setup > Settings you will find ways to manage your system settings like defaults, number and currency formats, global session timeout settings etc.

### ➤ Show or Hide Modules

You can globally Hide or Unhide certain modules by clicking on Show/Hide Cards in your ERP Home Page.

For example, if you are in the services business, you want to hide the Manufacturing Module, you can do this using this tool.

Check/uncheck the items to show or hide modules.



### ➤ Document Naming Settings

Masters and transactions can be given prefixes in the form of naming series.

ERP allows you to make prefixes to your documents, with each prefix forming its own series. For example, a series with prefix INV12#### will have numbers INV120001, INV120002, and so on.

You can have multiple series for all your transactions. For example, Sales Invoice IDs like these can be generated:

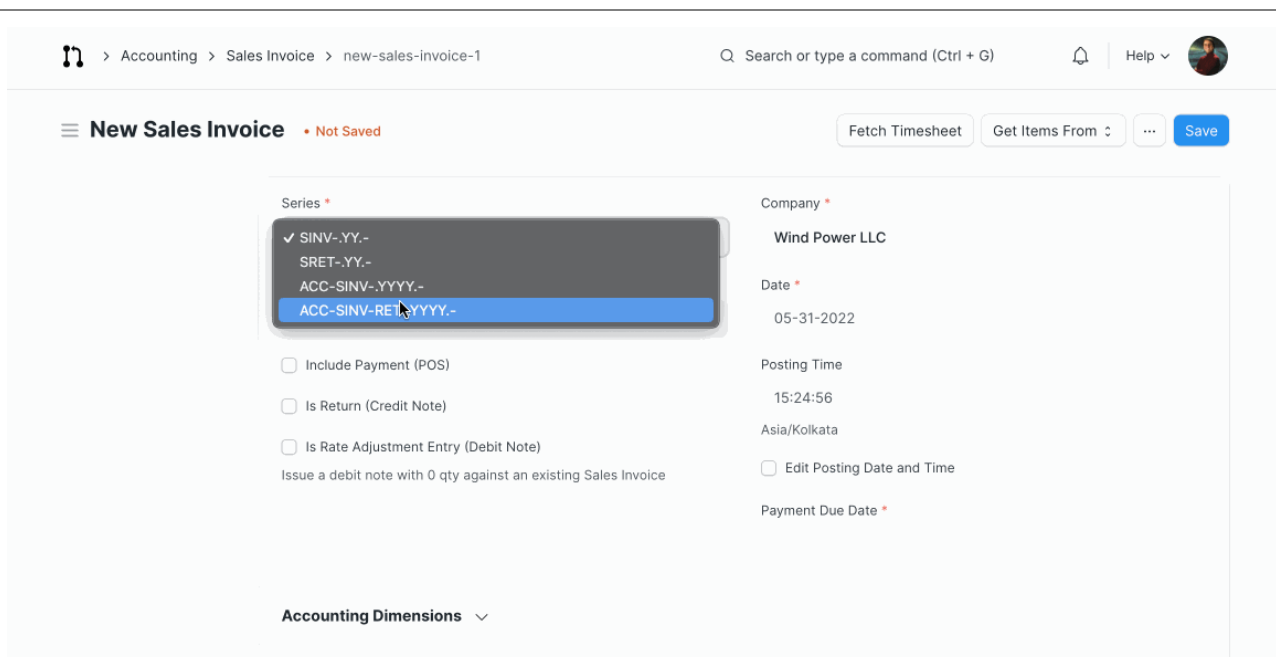
- ACC-SINV-.YYYY.-
- SINV12####
- SALESINV-00####

You can define or select the Naming Series pattern from:

Home > Settings > Document Naming Settings

#### 1. Setting up Naming Series for Documents

1. Select the transaction for which you want to make the series. The system will update the current series in the text box.
2. Edit the series as required with unique prefixes for each series. The first prefix will be the default prefix. Each new prefix Naming Series must be added on a new line. The newly added naming series will be available in the document.



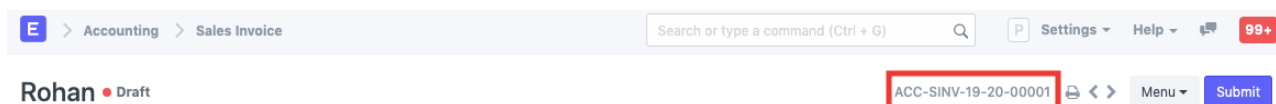
3. If you want the user to explicitly select a series instead of the default one, check the "User must always select" checkbox. There will be no default naming series if this is ticked.
4. You can also update the starting point of a series by entering the series name and the starting point in the "Update Series" section.
5. Click on the Update button to update the set of Naming Series for the selected document.

Note: To see the newly added Naming Series, click on Settings > Reload.

## 2. Financial Year in Naming Series

You can also show the financial year in the Naming Series. By default, if you enter "YYYY" in the naming series, it'll pick up the current year. To set naming series based on the fiscal year, enter something like 'ACC-SINV-.19-20.-' where 19-20 is the current Fiscal Year. It is common to have a separate series for each financial year.

As you can see, in the following screenshot of a Sales Invoice, the year 2019 is listed:



## 3. Updating the current value for existing Naming Series

You can change the starting/current sequence number of an existing series.

1. Under the Update Series section, select the prefix whose sequence is to be changed.
2. The current value will be fetched and displayed.
3. Change starting/existing sequence number if needed.
4. Click on Update Series Number.

For example, if the current Sales Order series number is at 16, and you want to restart or set it as 50, enter 0 or 50 depending on your case. Any new Sales Order created will start from the new sequence number.

To know more about this, [visit this article](#).

Tip: You could have a separate series for each type of Customer or for each of your retail outlets.

## 4. Using Field Values in Naming Series

Some companies prefer to make use of "short-codes" for suppliers, i.e. WN for company "Web Notes" that later can be used in naming series for quick identification.

For example:

A custom field "Vendor ID" is created under Document: Supplier.

Then under Naming Series, we allow something like

PO-.YY.MM.-.vendor\_id.-.####

Resulting in "PO-1503-WN-00001"

## ➤ Session Defaults

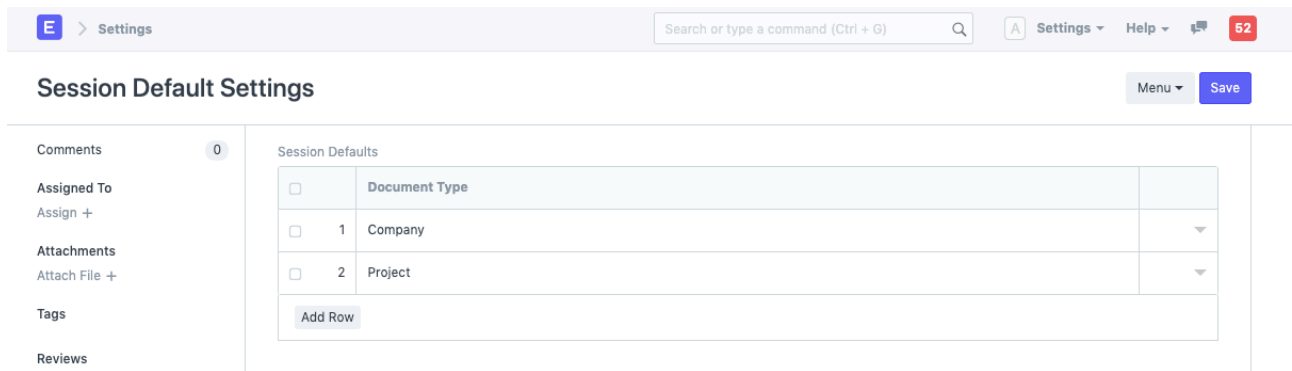
**Session Defaults are configurable default values set during user sessions.**

Consider a scenario where you have 8 companies set up in your account and you have to set the 'Company' field every time while creating a new Sales Order. This is a very time-consuming process when you have to deal with multiple Sales Orders daily.

### 1. How to Create Session Defaults

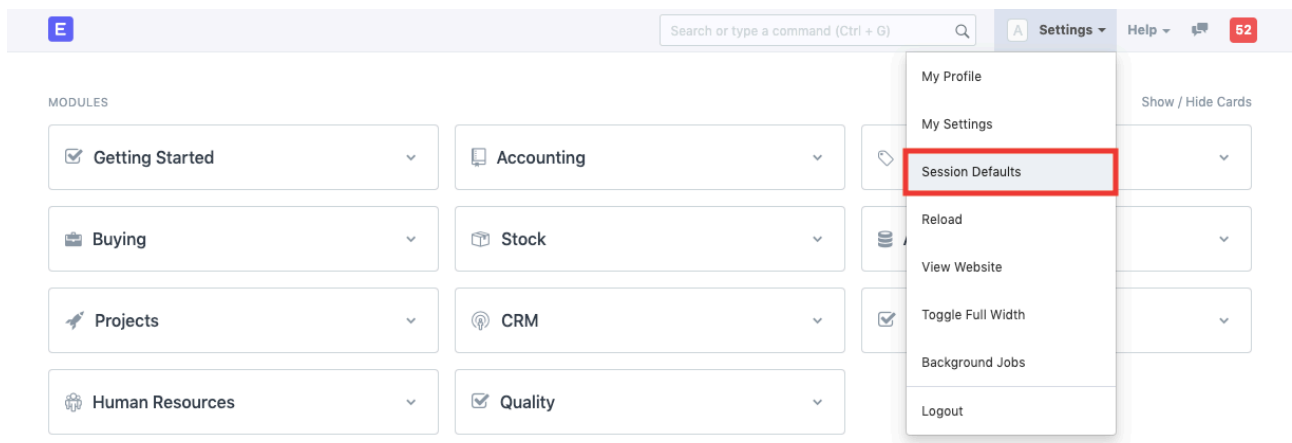
#### 1.1 Set up the Session Default Settings

1. Go to Session Default Settings. There you can see a table for Session Defaults.
2. Click on 'Add Row'.
3. Select the DocType for which you want to set Session Defaults.
4. Save.



#### 1.2 Set up the Session Default Values

1. Click on the 'Settings' menu in the toolbar. You will find an option 'Session Defaults' there. Click on it.



2. A 'Session Defaults' prompt will appear. Set the default values for the respective fields and Save.

## Session Defaults

Close

Save

Default Company

ERPNext

Default Project

Write Docs



Settings

After saving, the default values will be set everywhere.

You can open a new Sales Order and check. The company field is set to the default Company.

**E** > Selling > Sales Order Search or type a command (Ctrl + G) Settings Help 52

**New Sales Order 1** ● Not Saved Save

Get items from ▾

|                                      |  |
|--------------------------------------|--|
| <p>Series</p> <p>SAL-ORD-.YYYY.-</p> | <p>Company</p> <p>ERPNext</p>            |
| <p>Customer</p> <p></p>              | <p>Date</p> <p>22-07-2019</p>            |
| <p>Order Type</p> <p>Sales</p>       | <p>Delivery Date</p> <p></p>             |
|                                      | <p>Customer's Purchase Order</p> <p></p> |

Open a new Task. The 'Project' field is set to the default Project.

**E** > Projects > Task Search or type a command (Ctrl + G) Settings Help 52

**New Task 1** ● Not Saved Save

|                                  |                            |
|----------------------------------|----------------------------|
| <p>Subject</p> <p></p>           | <p>Status</p> <p>Open</p>  |
| <p>Project</p> <p>Write Docs</p> | <p>Priority</p> <p>Low</p> |
| <p>Issue</p> <p></p>             | <p>Weight</p> <p></p>      |

Open a report, for example, General Ledger. Company filter is set to the default Company.

E > Accounting
Settings Help 52

### General Ledger

ERPNext

Finance Book

22-06-2019

22-07-2019

Account

Voucher No

Party Type

Include Default Book Entries

Group by Voucher (Consol)

Cost Center

Project

☐ Show Opening Entries
☐ Include Default Book Entries

|   | Posting D... | Account                   | Debit (INR) | Credit (INR) | Balance (INR) | Voucher Type | Voucher No | Against Account | Party Type |
|---|--------------|---------------------------|-------------|--------------|---------------|--------------|------------|-----------------|------------|
| 1 |              | Opening                   | 0.000       | 0.000        | 0.000         |              |            |                 |            |
| 2 |              | Total                     | 0.000       | 0.000        | 0.000         |              |            |                 |            |
| 3 |              | Closing (Opening + Total) | 0.000       | 0.000        | 0.000         |              |            |                 |            |

For comparison, use >5, <10 or =324. For ranges, use 5:10 (for values between 5 & 10).
Execution Time: 0.1 sec

## 2. Features

### 2.1 Defaults cleared on logout

The default values are set for that particular user for the ongoing session. Once logged out, these default values are cleared.

### 2.2 'Settings' button visibility

The Settings button is only visible to the System Manager or to a person having permission to access 'Session Default Settings'. This button navigates you to Session Default Settings where you can add or remove the document types for which you want to set Session Defaults.

### Session Defaults

Close Save

#### Default Company

ERPNext

#### Default Project

Write Docs

Settings

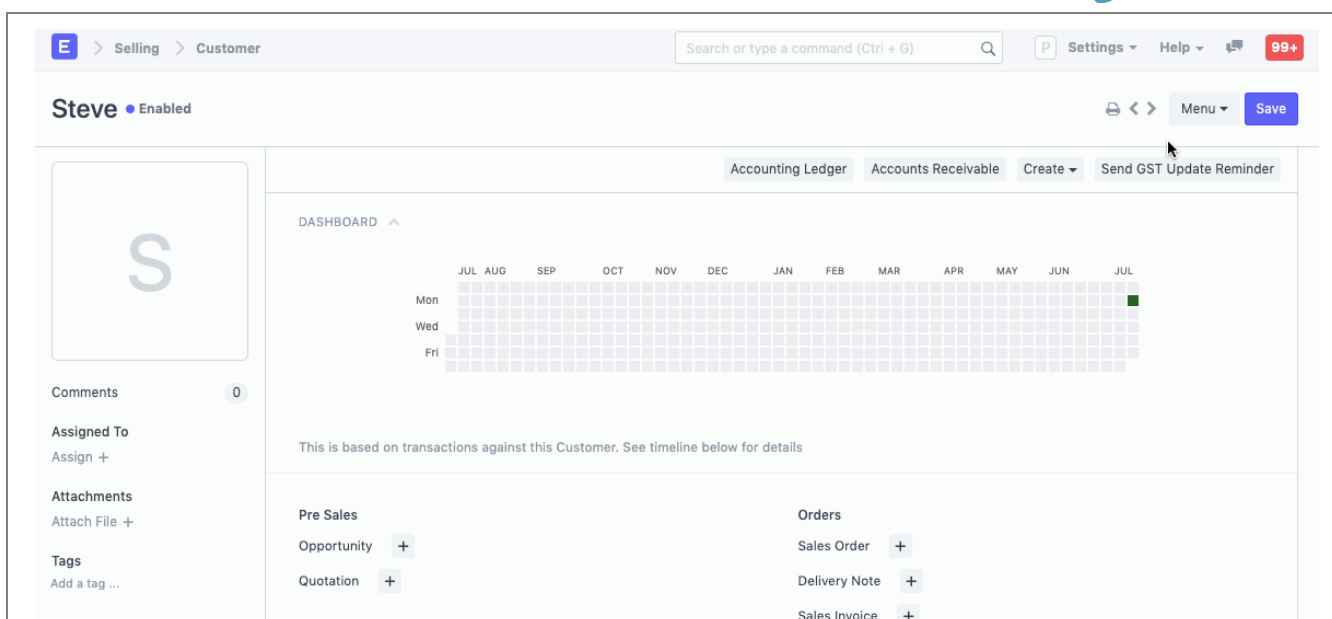
### ➤ Bulk Renaming of Records

**Bulk Renaming allows renaming multiple records at once.**

You can rename a document in ERP (if it is allowed) by going to **Menu > Rename** in the document.

Alternatively, if you want to rename a whole bunch of records, use the Rename Tool. Go to:

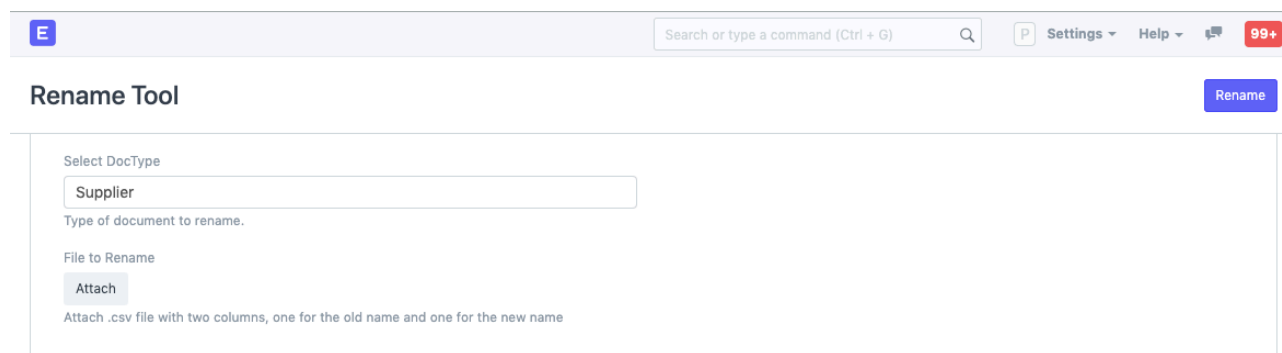




Home > Settings > Rename Tool

This tool will allow you to rename multiple records at the same time.

To rename multiple records, upload a **.csv** file with the old names in the first column and the new names in the second column. Then click on **Upload**.



You can also merge documents by renaming them. For example, if you have a customer named Steve and a duplicate named Steve1, you can go to either of them, click on Menu > Rename and tick the 'Merge with existing' checkbox. This will merge all the linked documents of both documents. To know more, visit this page.

## ➤ Bulk Update

**Bulk Update allows you to update a particular field of a DocType for all documents.**

To access Bulk Update, go to:

Home > Settings > Bulk Update

Consider that you have 20 quotations in which you had selected 'All Territories' and now you want to change the Territory to France. Instead of updating the individual quotations manually, you can use Bulk Update to update all 20 Quotations at once.

To do this,

1. Go to Bulk Update.
2. Select the Document Type, like Quotation.
3. Select the field to update, like territory.
4. Enter a **valid** new value to be updated.
5. Enter any conditions that apply, for example, status="Draft" will only affect documents in the Draft stage.

6. Select the limit, i.e. number of documents (Quotations) to be updated.
7. Click on Update.

E

> Tools

Search or type a command (Ctrl + G)

P

Settings

Help

99+

Bulk Update

Not Saved

Menu

Update

Comments

0

Assigned To

Assign +

Attachments

Attach File +

Tags

Reviews

+

Shared With

+

Document Type

Quotation

Field

territory

Update Value

United States

Condition

status="Draft"

Note: You can only update fields that can be updated normally in a particular stage. For example, valid till date cannot be updated for submitted Quotations.

## ➤ Domain settings

You can select the domains to be active globally under Domain Settings.

To access Domain Settings, go to:

Home > Settings > Domain Settings

If a domain is disabled, the following things will happen:

- The domain card will be unavailable on the home page
- The DocTypes related to the domain will no longer be accessible. For example, if you disable the Education module, Student and other DocTypes in Education will not be accessible.

E

> Settings

Search or type a command (Ctrl + G)

P

Settings

Help

99+

Domain Settings

Menu

Save

Comments

0

Assigned To

Assign +

Attachments

Attach File +

Tags

Reviews

+

Shared With

+

ACTIVE DOMAINS

☒ Services

☒ Manufacturing

☒ Distribution

☒ Non Profit

☐ Agriculture

☐ Hospitality

☐ Healthcare

☐ Education

☒ Retail

## ➤ Energy Point System

## Energy Points System is a rating/karma system that you can enable for your organization.

This system can be used to track the performance of each user.

To enable Energy Point System go to **Energy Point Settings** check **Enabled**.

### 1. How to use the Energy Point System?

To start using this system you need to create some Energy Point Rules (see section 3. How to create Energy Point Rules?) so that users can get energy points based on their activities.

### 2. What are Energy Point Rules?

Energy Point Rules store the information about the activity and the value of points to be allocated.

Energy Point Rule has the following fields:

| Field             | Description   |
|-------------------|---|
| Reference DocType | Document Type you want to apply the rule on eg. Task, ToDo, Issue, etc.   |
| For               | Document Options: Save, Submit, Cancel, and Custom.   |
| Event             | <b>Note:</b> If "Custom" option is selected then the "Conditions" field becomes mandatory   |
| Points            | Points to be allocated.   |
| Allot Points      | To If checked, users assigned to the reference document will get points. eg. If users Reema and Jai are assigned to a particular task then both of them i.e, Reema and Jai will get points when the document fulfills the condition |
| Assigned Users    |   |
| User Field        | Field from which user will be selected eg. Resolved By, Modified By, Owner, etc. can be used. If Modified By is selected, the last person to satisfy the doc condition will get the points.   |
| Multiplier Field  | Field which stores value for the multiplier. This field can take numeric and decimal values which will be multiplied with points defined in the rule.<br>For example: 2 (multiplier) * 10 (points set in the rule) = 20 points      |
| Condition         | Condition for the point allocation.<br>eg. doc.status == 'Closed'<br>The above condition will check whether the status field in the document is 'Closed' and if yes then the points will be allocated to the user.                  |
| Apply Only Once   | The rule will be applied only once per document.  |

**Note:** User Field and Multiplier Field are fetched from the reference doctype.

### 3. How to create Energy Point Rules?

Search for **Energy Point Rule** > create new Energy Point Rule

Take a look at the following example rule:

Energy Point Rule

On issue close

Search or type a command (Ctrl + G)

Help

A

On issue close

Enabled

Assigned To

+

Attachments

Attach File

+

Reviews

+

Shared With

+

Tags

Add a tag ...

0 · 0

FOLLOW

You edited this just now

You created this just now

Enabled

Reference Document Type \*

Issue

For Document Event

Custom

Points \*

10

☐ Allot Points To Assigned Users
 Users assigned to the reference document will get points.

User Field \*

Raised By (Email)

The user from this field will be rewarded points

Multiplier Field

☐ Apply Only Once
 Apply this rule only once per document

Condition \*

1 Doc.status == 'Closed'

If the condition is satisfied user will be rewarded with the points. eg. doc.status == 'Closed'

Expand

The screenshot above is the rule for **Issue Closing**. So when any user closes the issue he/she will be rewarded with **10** points.

Other cases can be covered similarly.

Suppose, you want to create a rule where a user gets points on completing a task, you can do so by creating following rule

Energy Point Rule

On Task Completion

Search or type a command (Ctrl + G)

Help

A

On Task Completion

Not Saved

Assigned To

+

Attachments

Attach File

+

Reviews

+

Shared With

+

Tags

Add a tag ...

0 · 0

FOLLOW

You edited this 1 month ago

You created this 1 month ago

Enabled

Reference Document Type \*

Task

For Document Event

Custom

Points \*

10

☐ Allot Points To Assigned Users
 Users assigned to the reference document will get points.

User Field

Completed By

The user from this field will be rewarded points

Multiplier Field

☐ Apply Only Once
 Apply this rule only once per document

Condition

1 doc.status == "Completed"

If the condition is satisfied user will be rewarded with the points. eg. doc.status == 'Closed'

Expand

#### 4. Features:

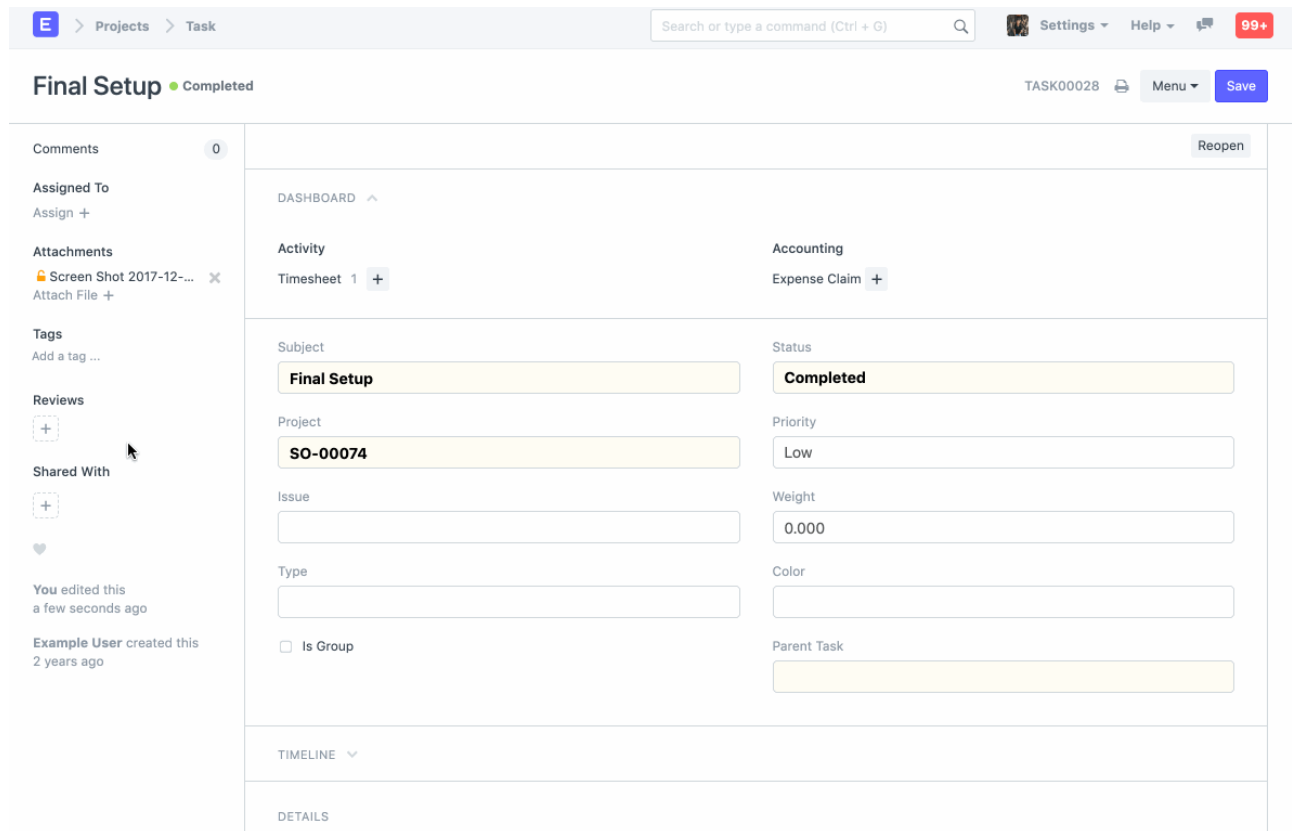
##### 4.1 Auto Point allocation

Based on energy point rules created, users will automatically get points when they complete activities which are tracked using the Energy Point System.

##### 4.2 Review System

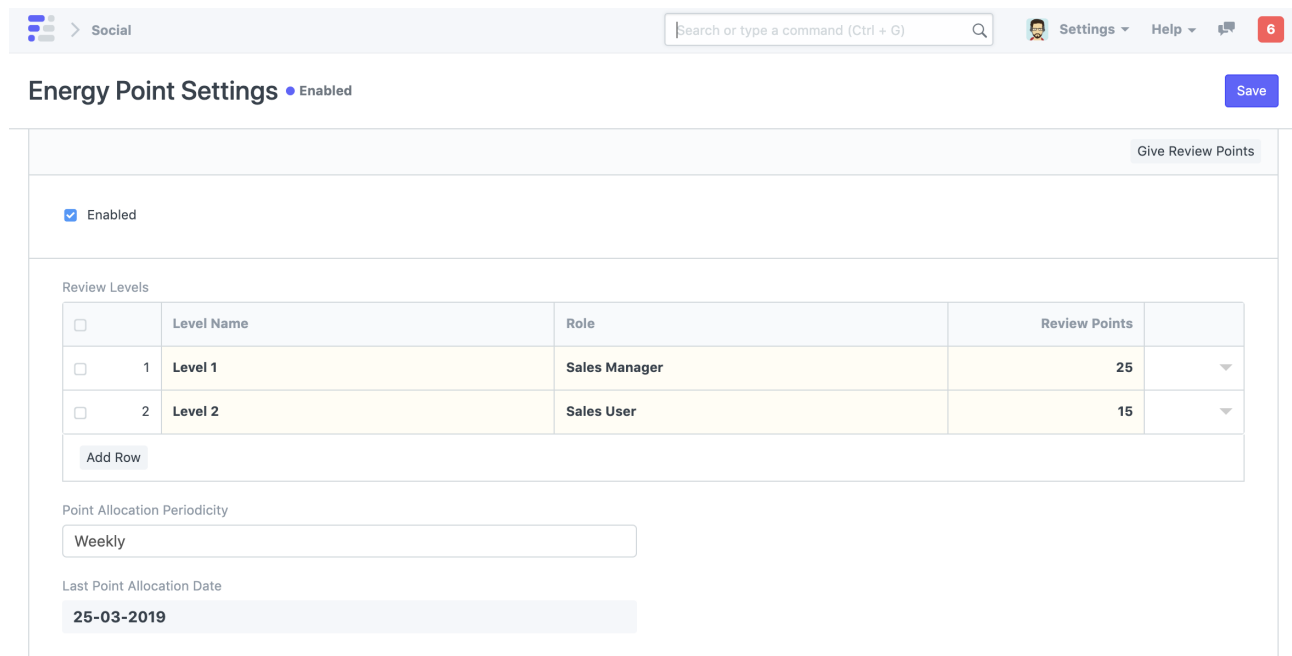
Review system can be used to "Appreciate" or "Criticize" someone's work.

Check out the following GIF for the review process.



For reviewing, the user needs to have review points which can be assigned by System Manager through **Energy Point Settings**.

You can also setup auto review point allocation from 'Energy Point Settings':












#### 4.3 Leaderboard

Go to Social Home > Leaderboard (side navigation bar)

The leaderboard shows the user's standing in the organization.

## Leaderboard

| Search User |   | This Month    |               |              |
|-------------|---|---------------|---------------|--------------|
| #           | User  | Energy Points | Review Points | Points Given |
| 1           |  <b>Nabin Hait</b><br><i>No Bio</i>                  | 1743          | 50            | 100          |
| 2           |  <b>Jai Chavan</b><br>You know who I am.             | 1586          | 245           | 405          |
| 3           |  <b>Umair Sayed</b><br><i>No Bio</i>                 | 1430          | 180           | 95           |
| 4           |  <b>Aditya Hase</b><br>I write executable pseudocode | 1285          | 150           | 0            |
| 5           |  <b>Faraz Khatri</b><br><i>No Bio</i>                | 1278          | 150           | 0            |
| 6           |  <b>Rohit Waghchaure</b><br><i>No Bio</i>            | 1271          | 100           | 50           |
| 7           |  <b>Harshit Agrawal</b><br>Seek Discomfort!          | 1256          | 0             | 150          |
| 8           |  <b>Mitali Deshpande</b><br><i>No Bio</i>            | 1139          | 30            | 180          |
| 9           |  <b>Ketan Desai</b><br>Make your Influence awesome   | 1100          | 60            | 90           |

## DATA PRIVACY

### ➤ Personal Data Download

As a part of GDPR compliance, ERP has Personal Data Download.

Personal data download tool enables a user to automatically download all the personal data they have generated while using ERP. This includes personally identifiable data from your user account like: username, full name, birth date, phone numbers, mobile numbers, location, interests, bio, email signature, Email, Contact, Address, Communication, etc. It also includes data from Leads and Opportunities, the details you have saved like phone numbers, mobile numbers, fax, website, and name.

#### 1. How to request user data download

1. To begin downloading data, the user has to **logged in** and visit [host-name]/request-data (e.g. ERP.com/request-data) in the URL field.

Request Data / Request Data

### Request Data

Cancel Save

---

User

sample-user@example.com

Save

2. After submitting your request, you will receive a success response.

A download link with your data will be sent to the Email Id associated with your account.

Continue

3. This will send an email with a download link of the data to the email address associated with the user.

● **ERPNext: Download Your Data**

Dear Sample User,

We have received a request from you to download your ERPNext data associated with: [sample-user@example.com](mailto:sample-user@example.com).

Click on the link below to download your data.

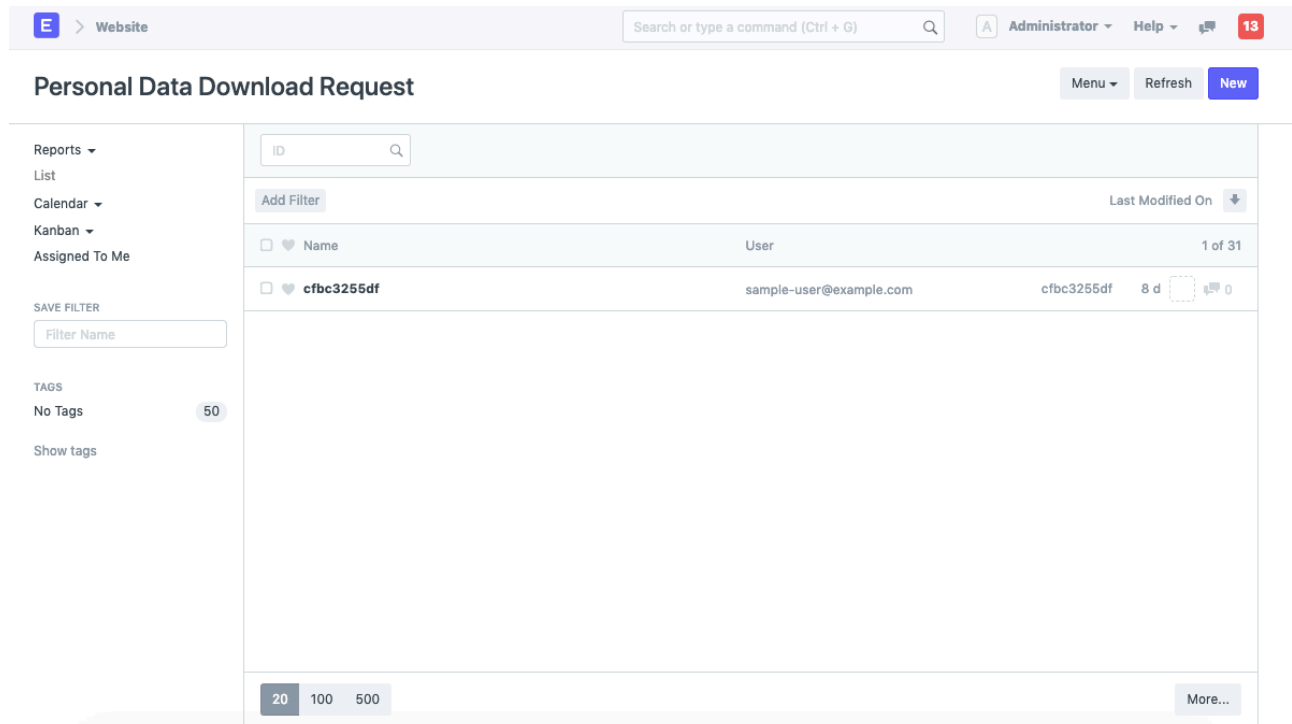
[Download Data](#)

You can also copy-paste this [Download Link](#) to your browser

The file available for download will be in the JSON format.

#### 2. Personal Data Download Request DocType

The request is also recorded in the DocType "Personal Data Download Request", the file-link that is sent to the user via email is also attached to the doc. Search for Personal Data Download Request from the search bar.



**Personal Data Download Request**

Menu Refresh New

Reports ▾  
List  
Calendar ▾  
Kanban ▾  
Assigned To Me

SAVE FILTER  
Filter Name

TAGS  
No Tags 50  
Show tags

ID

Add Filter

Last Modified On

| ID         | Name                    | User       | Last Modified On |
|------------|-------------------------|------------|------------------|
| cfbc3255df | sample-user@example.com | cfbc3255df | 8 d              |

20 100 500 More...

## ➤ Personal Data Deletion

As a part of GDPR compliance, ERP has Personal Data Deletion.

Personal data deletion tool enables a user to delete their account and anonymize all the personally identifiable data a user has generated while using ERP. That is, personally identifiable information will be randomized. This includes personally identifiable data from your user account like: username, full name, birth date, phone numbers, mobile numbers, location, interests, bio, email signature, Email, Contact, Address, Communication, etc. It also includes data from Leads and Opportunities, the details you have saved like phone numbers, mobile numbers, fax, website, and name.

However, this excludes data that is required by law to be maintained by a business.

### 1. How to request account deletion

- To begin deleting users account and personally identifiable data, you need to visit [host-name]/request-for-account-deletion (e.g. example.ERP.com/request-for-account-deletion) in the URL field.



## Request for Account Deletion

[Cancel](#)[Submit](#)

Send a request to delete your account and personally identifiable information (PII) that is stored on our system. You will receive an email to verify your request. Once the request is verified we will take care of deleting your PII. If you just want to check what PII we have stored, you can [request your data](#).

**Note: Your request for account deletion will be fulfilled within 3 days.**

Email \*

[Submit](#)

2. Enter the email associated with your ERP account. After submitting your request, you will receive a success response.

An email to verify your request has been sent to your email address. Please verify your request to complete the process.

[Continue](#)

3. This will send an email with a verification link to delete data to the email address associated with the user.

● **ERPNext: Confirm Deletion of Data**

Dear User,

We have received a request for deletion of ERPNext data associated with:  
[sample\\_user@example.com](mailto:sample_user@example.com).

This will permanently remove your data.

Click on the link below to verify your request.

Confirm Request

You can also copy-paste this [Verification Link](#) to your browser

Sent via [ERPNext](#)

4. Once the user clicks on the verification link. A confirmation message will be displayed.

● **Confirmed**

The process for deletion of ERPNext Data associated with sample-user@example.com has been initiated.

Home

## 2. How deleting user's personal data works

The request to delete data is recorded in the doctype "Personal Data Deletion Request".

## Personal Data Deletion Request

Menu Refresh New

Reports

List

Calendar

Kanban

Assigned To Me

SAVE FILTER

Filter Name

TAGS

No Tags

Show tags

ID

Email

Add Filter

Last Modified On

| <input type="checkbox"/> Name                          | Status               | Email                                  | 1 of 1 |
|--|----------------------|--|--------|
| <input type="checkbox"/> deleted-user-0031@deleted.com | Pending Verification | mangesh@iwebnotes.com 0031@deleted.com | 3 m    |

20 100 500

This doctype maintains three states of status to complete the process of removal of user data.

### 2.1 Pending Verification

This status indicates that the user has requested data deletion via the web-form. However, verification of this request is still pending. Search for Personal Data Deletion Request from the search bar.

deleted-user-0031@deleted.com Pending Verification

Menu Cancel

Comments

0

ASSIGNED TO

Assign +

ATTACHMENTS

Attach File +

Email

mangesh@iwebnotes.com

Status

Pending Verification

### 2.2 Pending Approval

This indicates that the user has verified the request via email. This enables the option of "Delete Data" for System Managers.

deleted-user-0007@deleted.com Pending Approval

Menu Save

Comments

0

ASSIGNED TO

Assign +

ATTACHMENTS

Attach File +

TAGS

Add a tag ...

SHARED WITH

Email

sample-user@example.com

Status

Pending Approval

Add a comment

Comment

### 2.3 Deleted

This indicates that the System Manager has clicked on the "Delete Data" button. This means that the user's personally identifiable data has been anonymized.

deleted-user-0007@deleted.com Deleted

Menu Save

Comments

0

ASSIGNED TO

Assign +

ATTACHMENTS

Attach File +

TAGS

Add a tag ...

Email

sample-user@example.com

Status

Deleted

Add a comment

Comment

### 3. Setting SLA for Personal Data Deletion Request.

You can also set an SLA for Personal Data Deletion Request through Website Settings. This will appear on the web form description.

- Go to Website Settings
- Scroll to the section called Account Deletion Settings
- In the **Account Deletion SLA (Days)** field set the number of days within which users request for Account Deletion will be fulfilled.
- If you enable **Show Account Deletion link in My Account page**, the form link will be visible to users on the My Account Page of the website

#### Account Deletion Settings

☒ Show Account Deletion Link in My Account Page

Account Deletion SLA (Days)

3

## **ARTICLES-CONFIGURATIONS**

### ➤ **Manage Tree Structure Masters**

Some of the masters in ERP are maintained in tree structure. Tree structured masters allow you to set Parent master, and Child masters under those Parents. Setting up this structure allows you creating intelligent report, and track growth at each level in the hierarchy.

Following is the partial list of masters which are maintained in the tree structure.

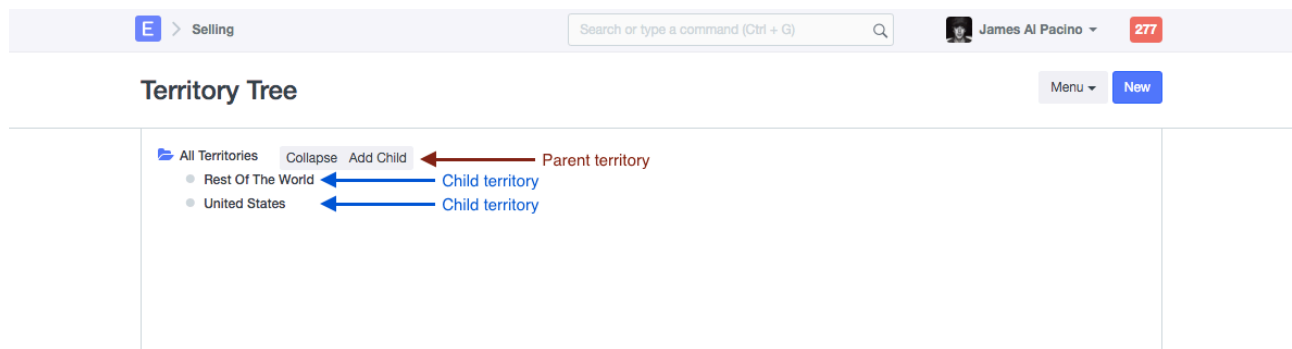
- Chart of Accounts
- Chart of Cost Centers
- Customer Group
- Territory
- Sales Person
- Item Group

Following are the steps to manage and create record in the tree structured master. Let's consider Territory master to understand managing tree masters.

#### **Step 1 : Go to Master\_**

Selling > Setup > Territory

#### **Step 2 : Parent Territory\_**



When click on Parent territory, you will see option to add child territory under it. All default Territory groups will be listed under Parent group called "All Territories". You can add further Parent or child Territory Groups under it.

#### **Step 3: Add new Territory\_**

When click on Add Child, a dialog box will provide two fields.

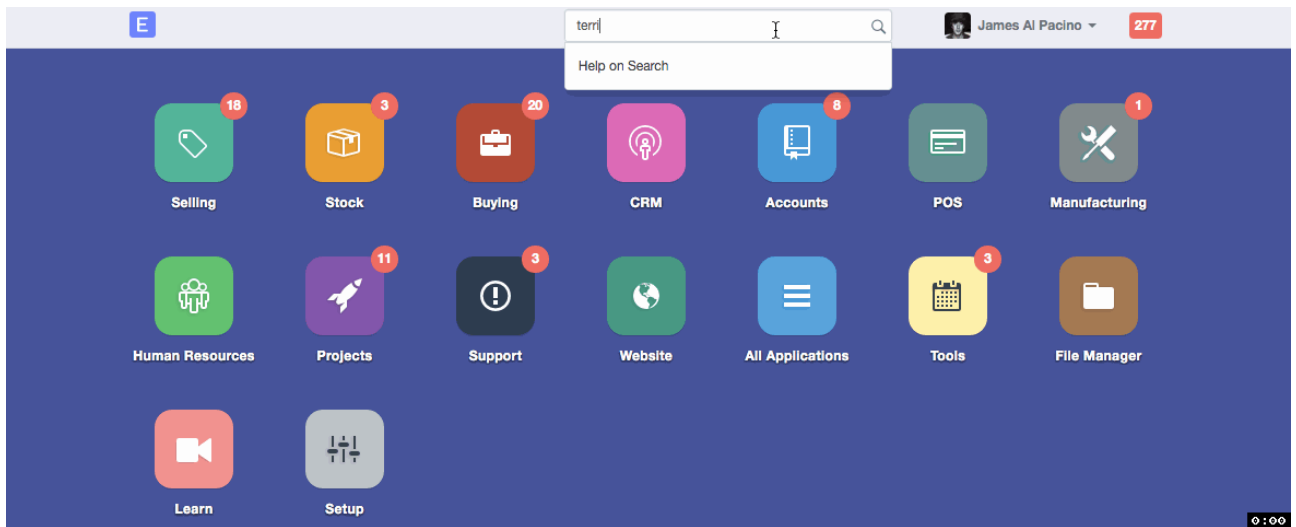
##### **Territory Group Name**

Territory will be saved with Territory Name provided here.

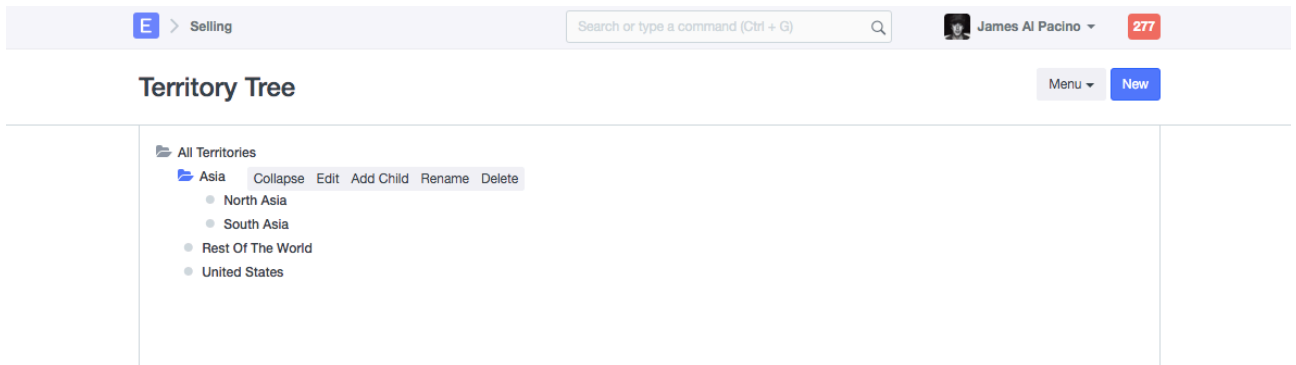
##### **Group Node**

If Group Node selected as Yes, then this Territory will be created as Parent, which means you can further create sub-territories under it. If select No, then it will become child Territory which you will be able to select in another masters.

Only child Territory Groups are selectable in another masters and transactions.



Following is how Child Territories will be listed under a Parent Territory.



Following this step, you can manage other tree masters as well in ERP.

### ➤ Set default values for any field

Using **Customize Form**, we can set a *default* value for any field of any Doctype in ERP.

#### Steps:

1. Open Customize Form using awesome search bar or via Menu options of any DocType. This will open a screen where you can view all the fields that comprise in this DocType.

E

> Settings

Search or type a command (Ctrl + G)

Q

A

Settings

Help

### Customize Form

Refresh Form

Reset to defaults

Set Permissions

Export Customizations

Enter Form Type

Stock Entry

→

Change Label (via Custom Translation)

Default Print Format

Max Attachments

0

☐ Hide Copy

☐ Is Table

☐ Quick Entry

☒ Track Changes

☐ Track Views

☐ Allow Auto Repeat

☒ Allow Import (via Data Import Tool)

Title Field

title

Use this fieldname to generate title

Image Field

Must be of type "Attach Image"

Search Fields

posting\_date, from\_warehouse, to\_warehouse, purpose, remarks

Fields separated by comma (,) will be included in the "Search By" list of Search dialog box

Sort Field

modified

▼

Sort Order

DESC

▼

2. Expand the field for which you want to store a default value and enter it under Display -> Default

E

> Settings

Search or type a command (Ctrl + G)

Q

A

Settings

Help

### Customize Form

Update

Editing Row #27

Insert Below

Insert Above

Duplicate

Move

▲

LABEL AND TYPE

Label

Default Source Warehouse

Type

Link

▼

Name

from\_warehouse

☐ Mandatory

☐ Unique

☐ In List View

☒ In Standard Filter

☐ In Global Search

☐ Bold

Length

0

Options

Warehouse

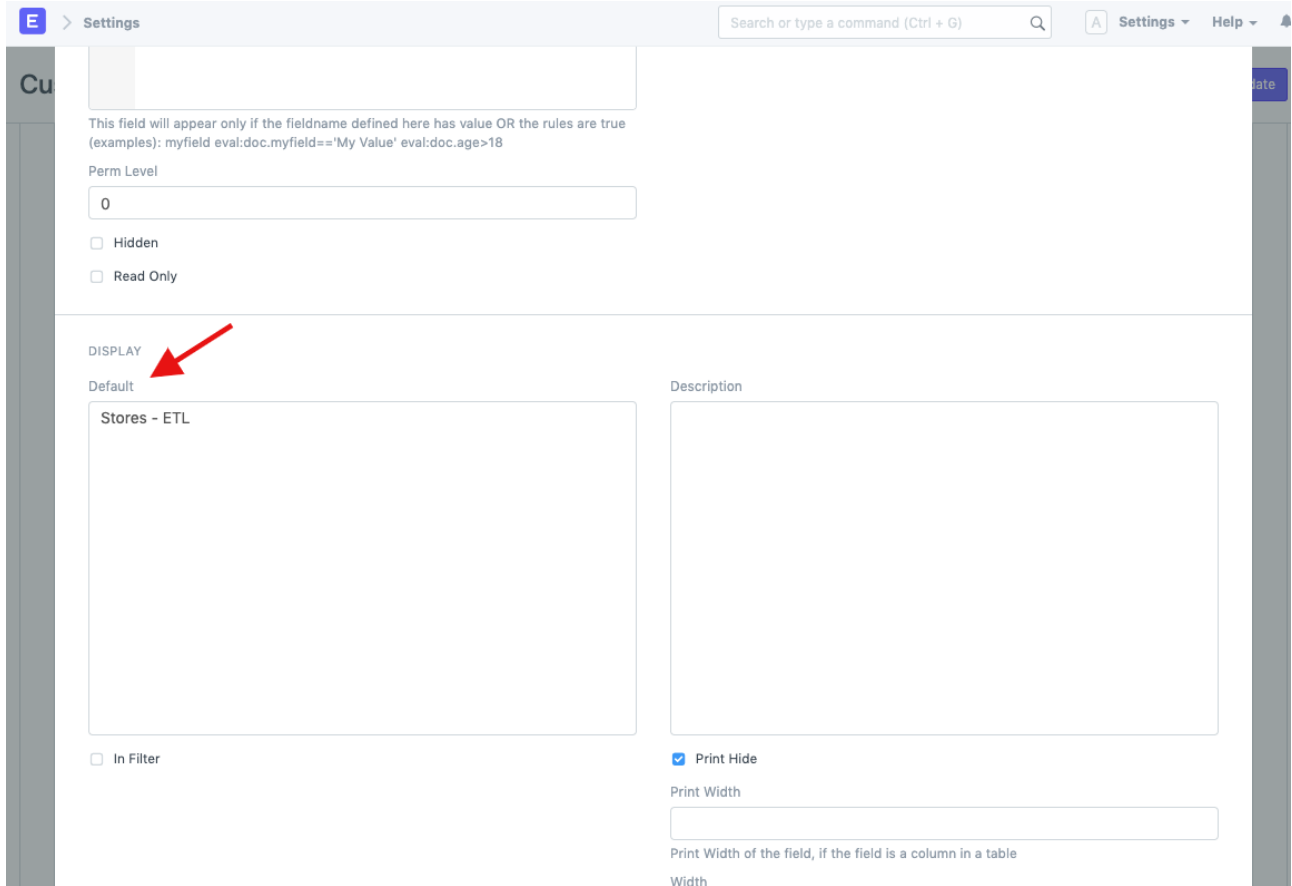
For Links, enter the DocType as range. For Select, enter list of Options, each on a new line.

Fetch From

☐ Fetch If Empty

If checked, this field will be not overwritten based on Fetch From if a value already exists.

PERMISSIONS



**Settings**

Search or type a command (Ctrl + G)

Settings Help

This field will appear only if the fieldname defined here has value OR the rules are true (examples): myfield eval:doc.myfield=='My Value' eval:doc.age>18

Perm Level

0

☐ Hidden

☐ Read Only

**DISPLAY**

Default

Stores - ETL

Description

☐ In Filter

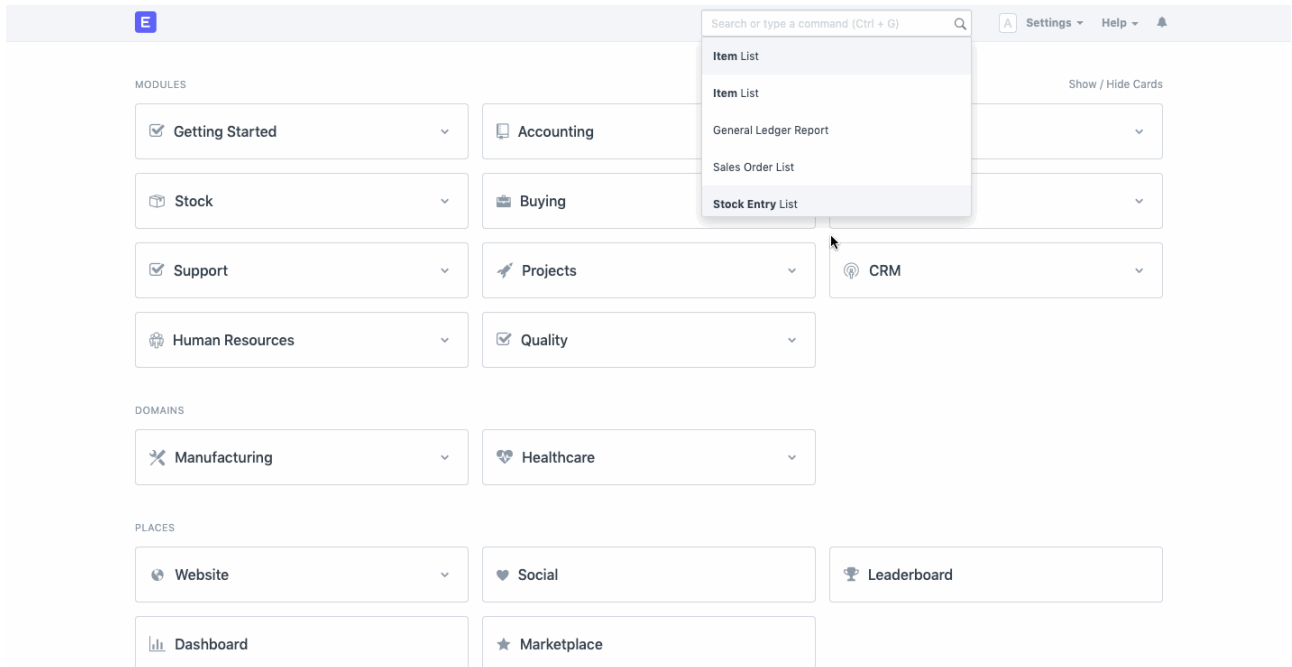
☒ Print Hide

Print Width

Print Width of the field, if the field is a column in a table

Width

Check out the below GIF where we have set *default* value as **Stores - ETL** for field "Default Source Warehouse" in DocType Stock Entry:



**Modules**

Getting Started Accounting

Stock Buying

Support Projects CRM

Human Resources Quality

**Domains**

Manufacturing Healthcare

**Places**

Website Social Leaderboard

Dashboard Marketplace

## ➤ Set Precision

In ERP, default precision for **Float**, **Currency** and **Percent** field is three. It allows you to enter value having value upto three decimal places.

You can also change/customize the precision settings globally or for a specific field.

To change the precision globally, go to:



Home > Settings > System Settings

E

> Settings

Settings

Help

System Settings

Not Saved

Menu

Save

Comments

0

Assigned To

Assign +

Attachments

Attach File +

Tags

Reviews

+

Shared With

+

You edited this

3 minutes ago

Country

India

Time Zone

Asia/Kolkata

Language

en

DATE AND NUMBER FORMAT

Date Format

dd-mm-yyyy

Number Format

###,###.##

Float Precision

3

Currency Precision

5

If not set, the currency precision will depend on number format

Alternatively, you can also set field specific precision. To do that go to [Customize Form](#) and select the DocType there. Then go to the specific field row and change precision. Precision field is only visible if field-type is one of the Float, Currency and Percent.

E

> Settings

Settings

Help

Cu

Editing Row #53

Insert Below

Insert Above

Duplicate

Move

LABEL AND TYPE

Label

Total Quantity

Type

Float

Name

total\_qty

☐ Mandatory
 ☐ Unique
 ☐ In List View
 ☐ In Standard Filter

Precision

☒ 1
 ☐ 2
 ☐ 3
 ☐ 4
 ☐ 5
 ☐ 6
 ☐ 7
 ☐ 8
 ☐ 9

For Links, enter the DocType as range. For Select, enter list of Options, each on a new line.

## ➤ Set Language

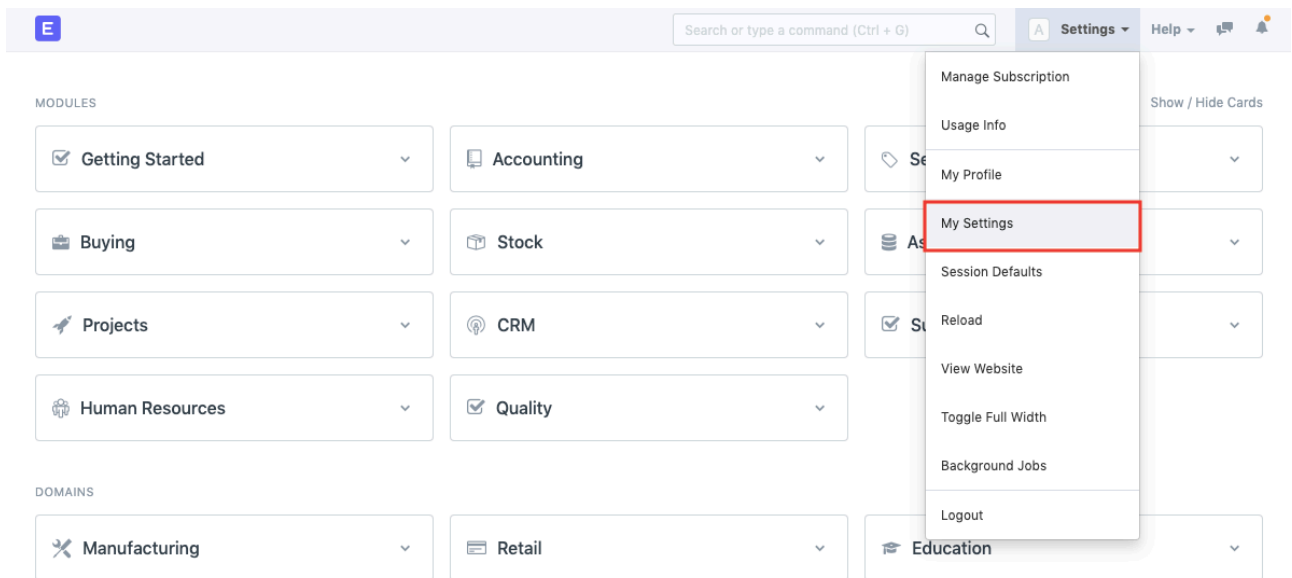
ERP is an multi-lingual application. It allows each user to select preferred language.

Following the below steps to know a User can customize the language in their account.

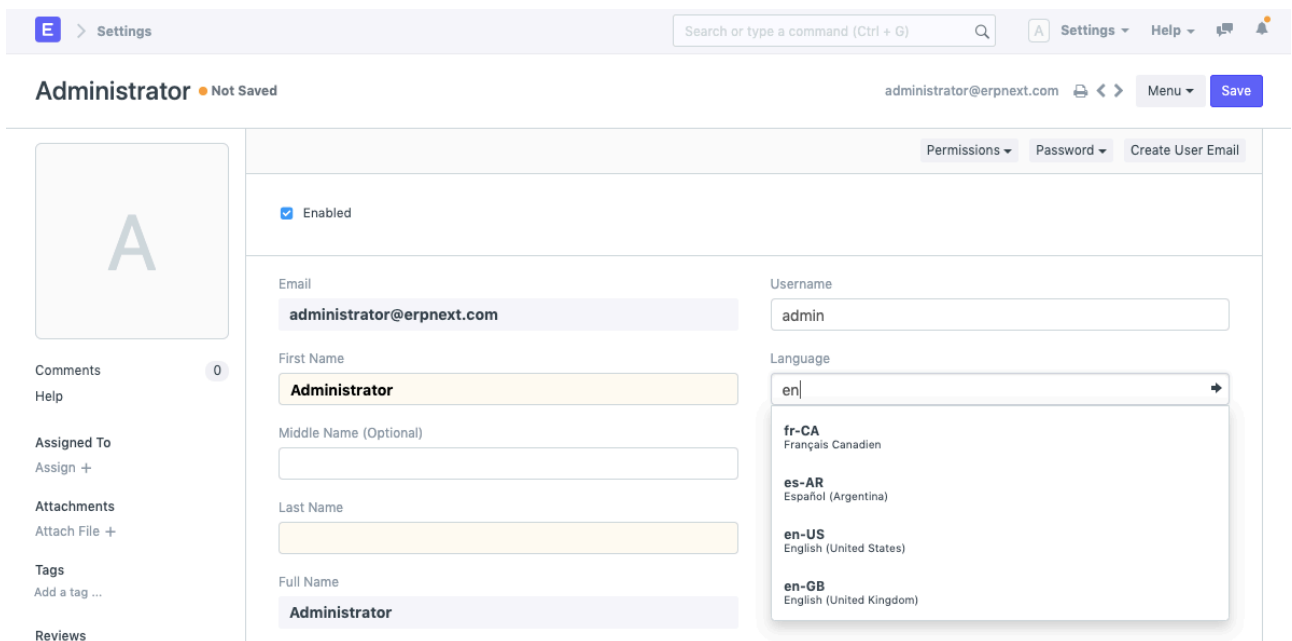
### 1. Setting Language in User's Account

Following are the steps to change language in your ERP account.

#### 1.1 Go to My Setting



## 1.2 Select Language



## 1.3 Save User

On saving User after selecting the language, your ERP account will refresh automatically and will be translated to your preferred language.

If you are a System Manager, you will be able to change the language for other users as well.

## 2. Set Language Globally for an Account

### 2.1 Go to Setup

Home > Settings > System Settings

### Set Language

## Settings

### Core

- System Settings
- Error Log
- Domain Settings

### Data

- Import Data
- Export Data
- Naming Series
- Bulk Rename
- Bulk Update
- Download Backups
- Deleted Documents

### Email

- Email Account
- Email Domain
- Notification
- Email Template
- Auto Email Report
- Email Digest
- SMS Settings

### Printing

- Print Format Builder
- Print Settings
- Print Format
- Print Style

### Workflow

- Workflow
- Workflow State
- Workflow Action

### Automation

- Assignment Rule
- Milestone
- Auto Repeat

## Save

Save System Settings, and refresh your ERP account. On refreshing, the language would be updated to your preferred language.

## ➤ Edit Submitted Document

To edit a submitted document, you need to cancel it first. Following are steps to edit submitted document. These steps assume you have the appropriate permissions for cancelling and editing a document.

### Step 1: Cancel Submitted Document

You will find Cancel button on upper right corner of submitted document.

## Duis Company • Overdue

SINV-00023



Menu

Cancel

### Comments

0

ASSIGNED TO

Assign +

ATTACHMENTS

Attach File +

TAGS

Add a tag...

Customer

Duis Company

☐ Is POS

Date

11-29-2015

Payment Due Date

11-29-2015

Company

Wind Power LLC

Accounting Ledger

Credit Note

Delivery

Payment

### Step 2: Amend the document

On cancellation of submitted document, Amend button will be became visible.

## Duis Company • Cancelled

SINV-00023



Menu

Amend

### Comments

0

ASSIGNED TO

Assign +

ATTACHMENTS

Attach File +

Customer

Duis Company

☐ Is POS

Date

11-29-2015

Payment Due Date

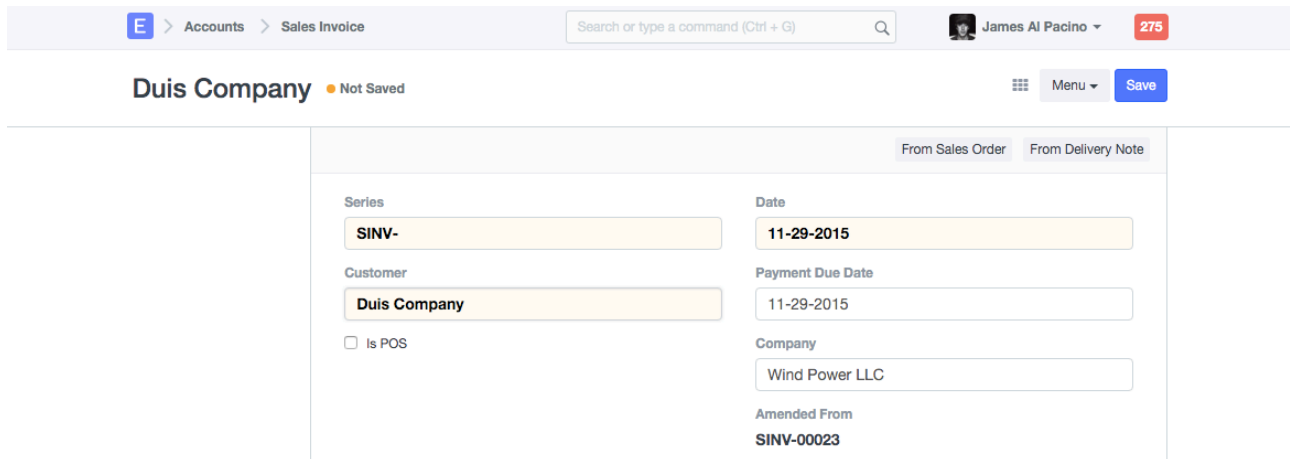
11-29-2015

Company

Wind Power LLC

### Step 3: Save and Submit the document

On clicking Amend button, same document will become editable again. After Making required changes, save and submit the document.



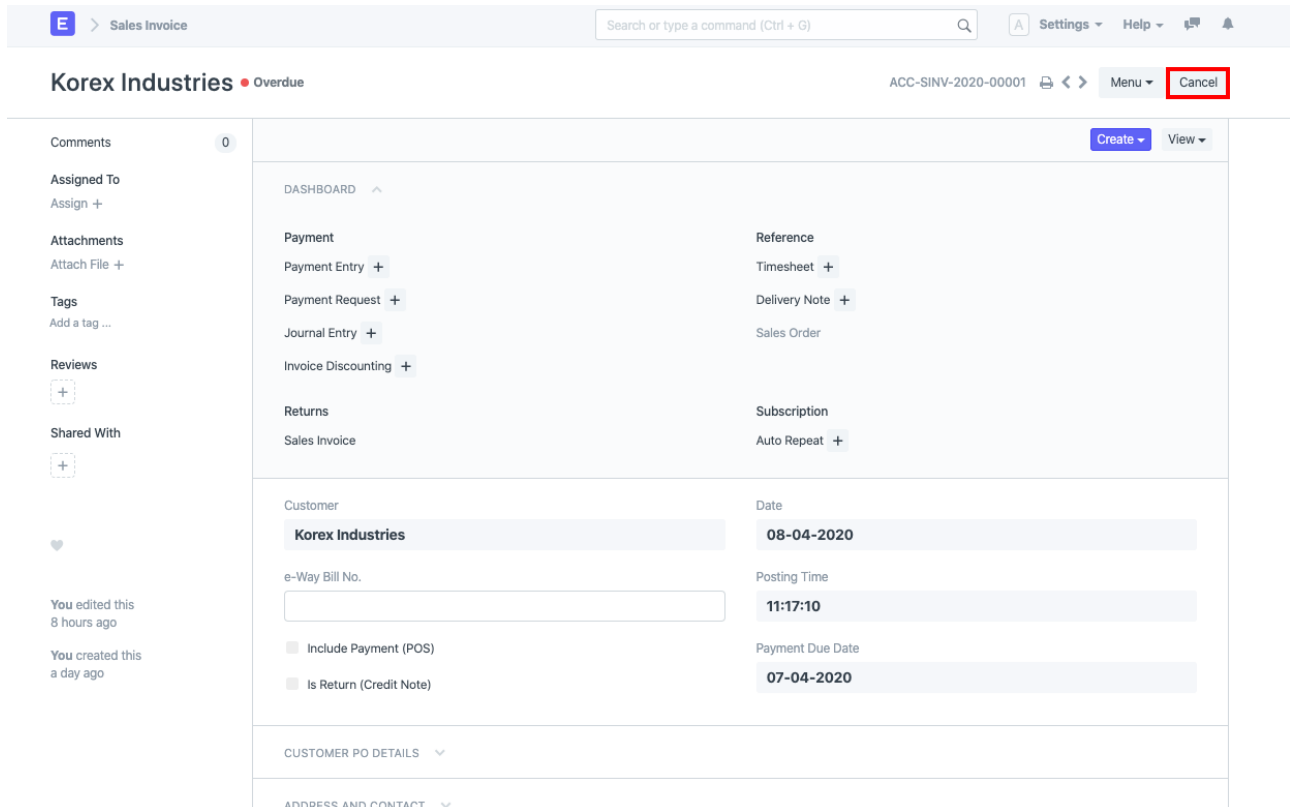
Note: If your document is linked with other documents, then you will need to cancel the dependant document before cancelling the parent document. Example: If you have created Delivery Note and Sales Invoice against Sales Order, which you need to amend, then you should first Cancel Delivery Note and Sales Invoice made for that Sales Order. Then amend Sales Order, re-save and re-submit it.

### ➤ Delete Submitted Document

To delete a submitted document, you need to cancel it first. Following are the steps to delete a submitted document. These steps assume that you have the appropriate permissions on the document that you wish to cancel and delete.

#### Step 1: Cancel Submitted Document

You will find Cancel button on upper right corner of submitted document.

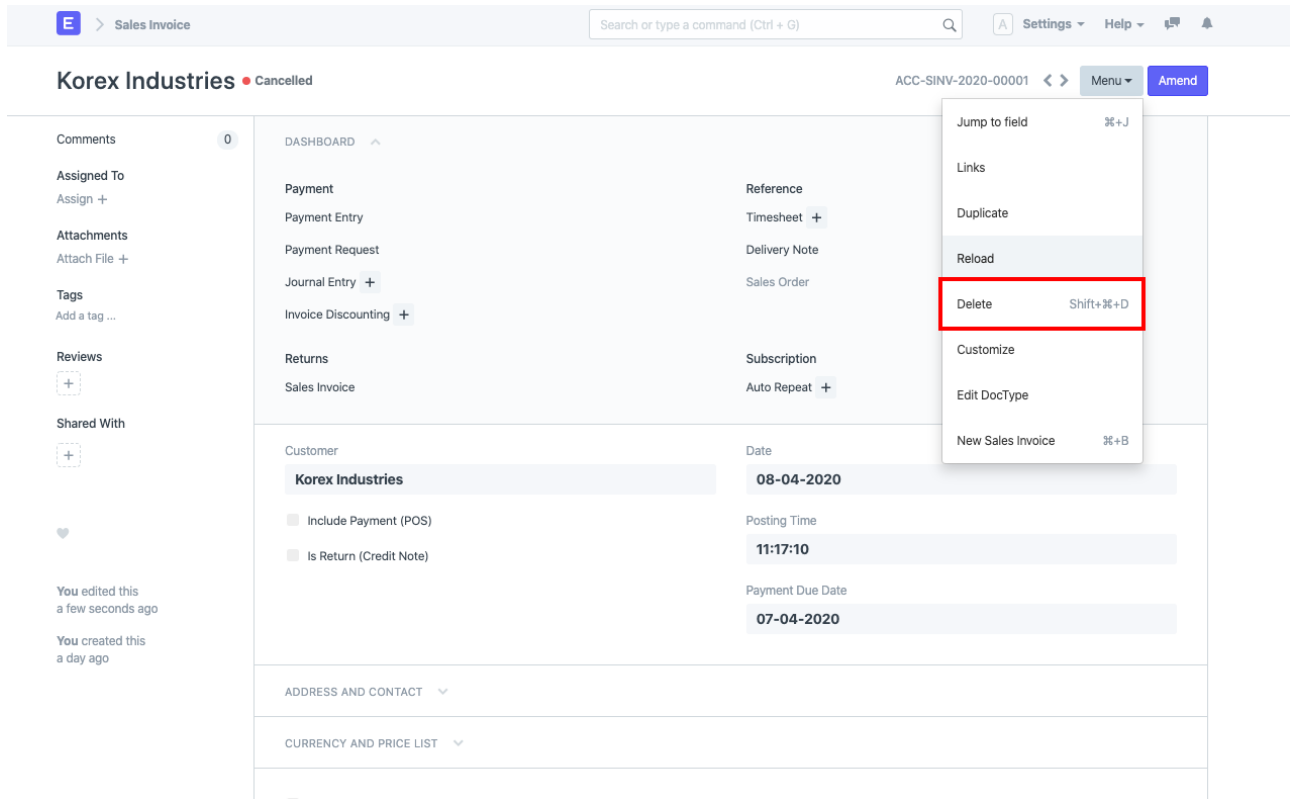


#### Step 2: Delete the document

On cancellation of submitted document, Amend button becomes visible with the document status set to Cancelled. This means that the

document has been cancelled successfully.

To delete the document, now click on Menu, then Delete. This will delete the selected document.



**Korex Industries** • Cancelled

ACC-SINV-2020-00001 < > Menu Amend

**Comments** 0

**Assigned To**  
Assign +

**Attachments**  
Attach File +

**Tags**  
Add a tag ...

**Reviews**  
+

**Shared With**  
+

You edited this a few seconds ago

You created this a day ago

**DASHBOARD** ^

**Payment**

Payment Entry

Payment Request

Journal Entry +

Invoice Discounting +

**Reference**

Timesheet +

Delivery Note

Sales Order

**Subscription**

Auto Repeat +

**Customer**

**Korex Industries**

☐ Include Payment (POS)

☐ Is Return (Credit Note)

**Date**

**08-04-2020**

**Posting Time**

**11:17:10**

**Payment Due Date**

**07-04-2020**

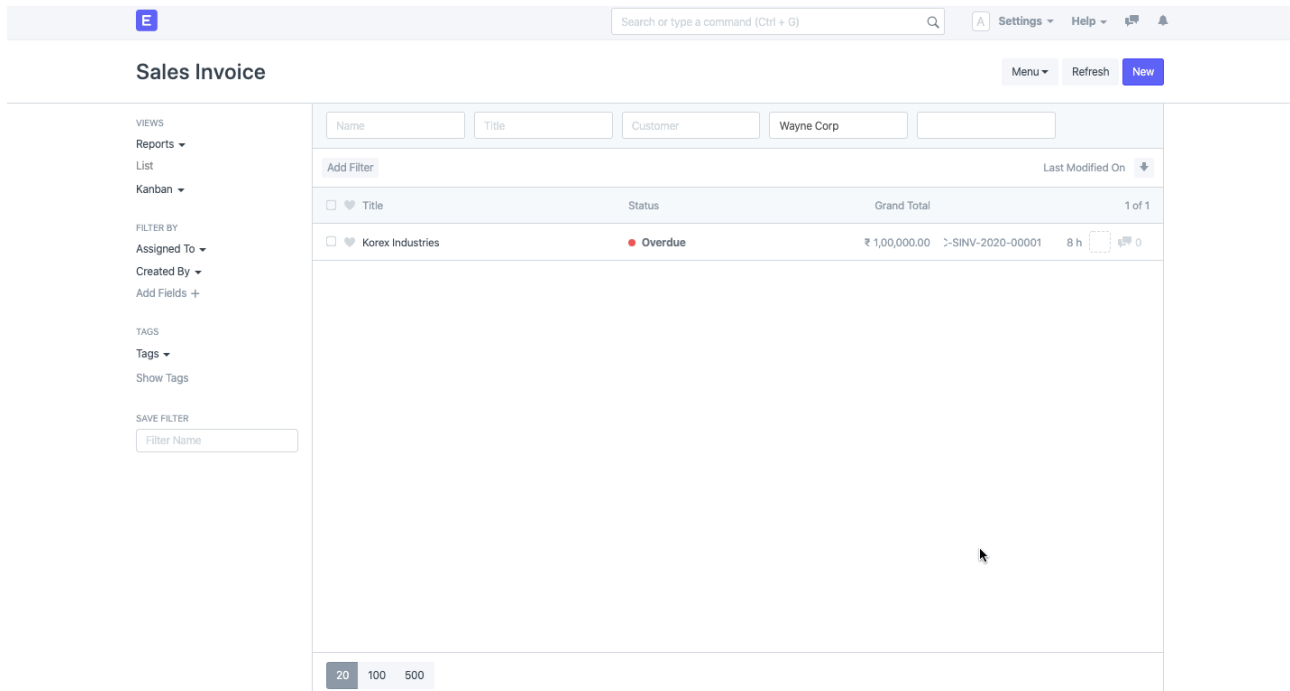
**ADDRESS AND CONTACT** v

**CURRENCY AND PRICE LIST** v

**Menu**

- Jump to field ⌘+J
- Links
- Duplicate
- Reload
- Delete** Shift+⌘+D
- Customize
- Edit DocType
- New Sales Invoice ⌘+B

**Note:** To delete multiple submitted documents in one go, you can select them in the list view and proceed to cancel and delete.



**Sales Invoice**

Menu Refresh New

**VIEWS**

Reports v

List

Kanban v

**FILTER BY**

Assigned To v

Created By v

Add Fields +

**TAGS**

Tags v

Show Tags

**SAVE FILTER**

Filter Name

Name Title Customer Wayne Corp

**Add Filter** Last Modified On v

| <input type="checkbox"/> Title            | Status  | Grand Total   | 1 of 1                 |
|---|---------|---------------|------------------------|
| <input type="checkbox"/> Korex Industries | Overdue | ₹ 1,00,000.00 | >SINV-2020-00001 8 h 0 |

20 100 500

If your document is linked with other documents, then you will need to cancel dependent document before trying to delete the parent document.

Example: If you have created Delivery Note and Sales Invoice against Sales Order, which you need to amend, then you should first Cancel Delivery Note and Sales Invoice made for that Sales Order. Then amend Sales Order, re-save and re-submit it.

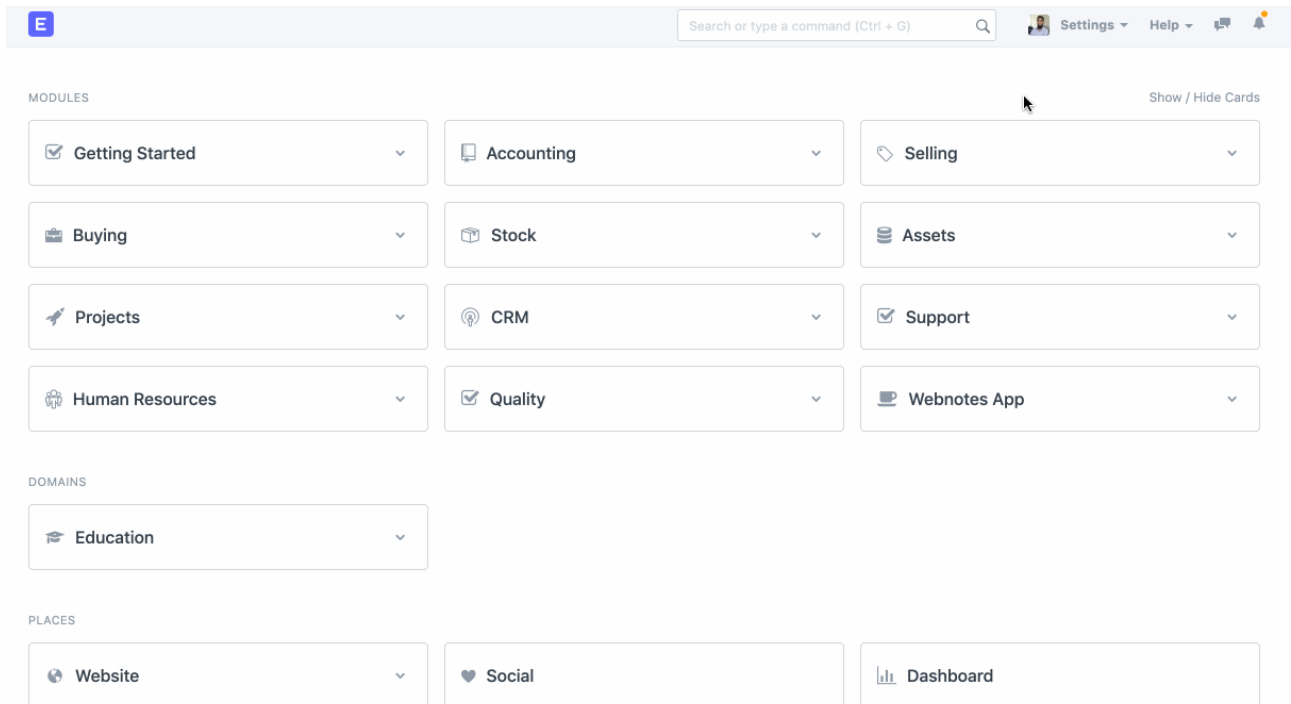
## ➤ Disable Notification Emails

### Question:

We are receiving email Notification after creation of each document. Can we disable the Email Notification for Energy Points allocation?

### Answer:

You can disable the notification for Energy Points and other features like Document Follow, Assignment and Mentions. Here is the help on how to disable the Notifications for the Energy Points and other features in specific.



## ➤ Set Current Value for Naming Series

Naming Series feature allows you to define prefix for naming of a documents. For example, if a Sales Order has prefix "SO", then the series will be generated as SO-00001, SO-00002... and so on. Click [here](#) to learn how you can customize Number Series for a transaction/master in ERP.

### 1. Setting the Current Value

Naming Series feature also offers a tool where you can set Current Value for specific prefix. This is generally required if you have recently started using ERP, and have old transactions in the previous system, and you want the numbering series to start in from where it ended in the old system. Let's consider a scenario to learn this better.

For example, you have 322 Sales Orders created in your old system with SO00322 as highest Sales Order Id. In ERP, you need the first Sales Order to pick up #323 when it is saved. To enable this, you should set Current Value for SO series in following steps.

#### Go to Naming Series Tool

Setup > System > Naming Series

#### Update Series Section

## Naming Series

### Series List for this Transaction

PO-

☐ User must always select

Check this if you want to force the user to select a series before saving. There will be no default if you check this.

Update

### Update Series

Change the starting / current sequence number of an existing series.

Prefix

✓ ATT-  
C-FORM-  
CI-  
COMM-  
COMP  
CUST-  
CUST-COMP  
Campaign-####  
DN-  
DN-RET-

### Select Prefix

Considering our scenario, prefix for Sales Order will be "SO".

Update

### Update Series

Change the starting / current sequence number of an existing series.

Prefix

SO-

Current Value

12

This is the number of the last created transaction with this prefix

Update Series Number

### Current Value

If you have currently 12 Sales Orders created in your account, then current value updated will be 12. You can edit Current Value to 322, and then click on Update Series Number.

## Naming Series

### Series List for this Transaction

PO-

☐ User must always select

Check this if you want to force the user to select a series before saving. There will be no default if you check this.

Update

### Update Series

Change the starting / current sequence number of an existing series.

Prefix

SO-

Current Value

322

This is the number of the last created transaction with this prefix

Update Series Number

With this setting, you will have numbering for the New Sales Orders starting with #323.

## 2. Error Due Series Number

If you receive a Duplicate Name error while saving a transaction, for example, while saving Item Price, you receive an error saying:

Duplicate name Item Price RFD/00016

This error message indicates that when you are saving Item Price, system is trying to allocate "RFD/00016" to that Item Price record. But it is finding that Item Price with this ID is already existing in your system.

This error could arise because Current Value for Series/Prefix of Item Price is disturbed and not in sync with actual Current Value. While actual Current Value for Item Price could be 20 (or any number more than 16), someone has set Current Value for this series as 15.

To confirm actual Current Value for particular Series, you should check report for document in question (Item Price in this case), and check for the Item Price ID with highest value.

Let's assume we find that actual Current Value for Item price is 22, then you go Naming Series, and set Current Value for the Prefix/Series of Item Price to 22, and Update Series Number.

These instructions is applicable for all the documents in ERP for which user can customize Series and its Current Value.

Let's consider another scenario to learn this better. On assigning a document to another user, error message says:

Duplicate name ToDo TDI00014286

This indicate the Current Value for Series/Prefix of ToDo (TDI) has been disturbed. You should follow these steps to correct value for Current Value for TDI prefix.

1. Check ToDo report for the highest ToDo id value.
2. Setup >> Settings >> Naming Series
3. Check section B of Update Series
4. Select Prefix for ToDo "TDI"
5. Ensure that highest number for ToDo is updated as Current Value in Naming Series. If not, correct Current Value, and click on "Update Series Numbering".

## ➤ Remove Link at the Bottom of the Print Page

Question:



How to remove the ERP link at the bottom of the page while printing it?

07/06/2020

Simran

Sales Order

SAL-ORD-2020-00014

Customer Name: Simran

Date: 03-02-2020

Delivery Date: 11-02-2020

| Sr | Item Code | Description   | Quantity | Discount Amount | Rate   | Amount | Weight Per Unit | Total Weight |
|----|-----------|---------------|----------|-----------------|--------|--------|-----------------|--------------|
| 1  | IT-5      | Car - Painted | Nos      | 1               | ₹ 0.00 | ₹ 0.00 | 0               | 0            |

Total Quantity: 1

Total: ₹ 0.00

Loyalty Points: 0

Grand Total: ₹ 0.00

Rounded Total: ₹ 0.00

Total In Words: INR Zero only.

Print

1 page

Destination: Save as PDF

Pages: All

Layout: Portrait

More settings

Cancel Save

[https://bobo.arpnext.com/printview?doctype=Sales Order&name=SAL-ORD-2020-00014&trigger\\_print=1](https://bobo.arpnext.com/printview?doctype=Sales Order&name=SAL-ORD-2020-00014&trigger_print=1)

#### Solution:

To remove the url at the bottom of the print page, following the below steps:

1) Click on the Print button.

E > Selling > Sales Order

Search or type a command (Ctrl + G)

M Settings Help

Simran Overdue

SAL-ORD-2020-00014

Menu Edit

Standard English Letter Head

Print Settings... Customize... Full Page PDF

Sales Order

SAL-ORD-2020-00014

Customer Name: Simran

Date: 03-02-2020

Delivery Date: 11-02-2020

| Sr | Item Code | Description   | Quantity | Discount Amount | Rate   | Amount | Weight Per Unit | Total Weight |
|----|-----------|---------------|----------|-----------------|--------|--------|-----------------|--------------|
| 1  | IT-5      | Car - Painted | Nos      | 1               | ₹ 0.00 | ₹ 0.00 | 0               | 0            |

Total Quantity: 1

Total: ₹ 0.00

Loyalty Points: 0

Grand Total: ₹ 0.00

Rounded Total: ₹ 0.00

Total In Words: INR Zero only.

2) Click on "More Settings"

07/06/2020

Paint

Item

IT - 6

Workflow State

Pending

Series

STO-ITEM-.YYYY.-

Maintain Stock

✓

Item Code

IT - 6

Include Item In Manufacturing

✓

Item Name

Paint

Opening Stock

0

Item Group

Raw Material

Valuation Rate

₹ 50.00

Default Unit of Measure

Litre

Standard Selling Rate

₹ 0.00

Over Delivery/Receipt Allowance (%)

0

Over Billing Allowance (%)

0

Paint

Shelf Life In Days

0

Weight Per Unit

0

End of Life

31-12-2099

Default Material Request Type

Purchase

| Sr | UOM | Conversion Factor |
|----|-----|-------------------|
|    |     |                   |

[https://bobo.arynet.com/printview/docType=Item&name=IT-6&trigger\\_print=1&format=Standard&no...](https://bobo.arynet.com/printview/docType=Item&name=IT-6&trigger_print=1&format=Standard&no...) 1/2

Print

2 pages

- ISS...

Destination

Save as PDF

Pages

All

Layout

Portrait

More settings

Cancel

Save

3) Uncheck the "Headers and Footers" checkbox.

07/06/2020

Simran

Sales Order

SAL-ORD-2020-00014

Customer Name

Simran

Date

03-02-2020

Delivery Date

11-02-2020

| Sr | Item Code | Description   | Quantity | Discount Amount | Rate   | Amount | Weight Per Unit | Total Weight |
|----|-----------|---------------|----------|-----------------|--------|--------|-----------------|--------------|
| 1  | IT-5      | Car - Painted | Nos      | 1               | ₹ 0.00 | ₹ 0.00 | 0               | 0            |

Total Quantity

1

Total

₹ 0.00

Loyalty Points

0

Grand Total

₹ 0.00

Rounded Total

₹ 0.00

In Words

INR Zero only.

[https://bobo.arynet.com/printview/docType=Sales Order&name=SAL-ORD-2020-00014&trigger\\_print=...](https://bobo.arynet.com/printview/docType=Sales Order&name=SAL-ORD-2020-00014&trigger_print=...) 1/1

Print

1 page

- ISS...

Destination

Save as PDF

Pages

All

Layout

Portrait

More settings

Paper size

A5

Pages per sheet

1

Margins

Default

Scale

Default

Options

☒ Headers and footers

☐ Background graphics

Cancel

Save

4) Click on Save.

## ➤ Remove Line Breaks in Print Formats

### Question:

In the Print Format, I am getting link breaks for each section. How can I disable it?



## Gadget Technologies Pvt. Ltd.

32, Cliff Hills, Marine Drive, Mumbai

### SALES INVOICE

SINV-00003

Customer Name **Latte Solutions** Date **15-11-2016**  
Contact **Basawaraj** Payment Due Date **15-11-2016**

| Sr | Description           | Quantity | Rate       | Amount     |
|----|-----------------------|----------|------------|------------|
| 1  | Installation Services | Unit 1   | ₹ 1,000.00 | ₹ 1,000.00 |

Total ₹ 1,000.00  
Grand Total **₹ 1,000.00**  
Rounded Total **₹ 1,000.00**  
In Words INR One Thousand only.

#### Answer:

To disable line breaks for the section breaks, you should uncheck field "Show Line Breaks after Sections" in its Print Format.

Print Format Builder > Select Print Format > Edit Settings > Uncheck field "Show Line Breaks after Sections"

E &gt; Setup

Search or type a command (Ctrl + G)



Umar Sayyed

Help

20+

### Sales Invoice Custom

Menu

Save

Filter...

Custom HTML

Title

Series

Customer

Customer Name

Is POS

Is Return

Offline POS Name

Date

Payment Due Date

Company

Drag elements from the sidebar to add. Drag them back to trash.

Edit Heading

**SALES INVOICE**

{{ DOC.NAME }}



Customer Name



Date



Address



Payment Due Date



#### ➤ Easy steps to setup Workflow

When a company has multiple levels of approval for a document, a Workflow can be set.

In ERP, you can go to Workflow list --> Create New --> Name the workflow and define :

1. States

## 2. Transition rules.

### 1. States :

When a document is passed on for different levels of approval, there are states defined at each level for the role of the user.

### Quotation

Active

Menu
Save

Reviews

Shared With

You edited this 4 months ago

You created this 7 months ago

65.05MB (0%) used

Emails will be sent with next possible workflow actions

STATES

Different "States" this document can exist in. Like "Open", "Pending Approval" etc.

All possible Workflow States and roles of the workflow. Docstatus Options: 0 is "Saved", 1 is "Submitted" and 2 is "Cancelled"

Document States

|                          | State                  | Doc Status | Update Field | Update Value | Only Allow Edit For |  |
|--------------------------|------------------------|------------|--------------|--------------|---------------------|--|
| <input type="checkbox"/> | 1 Draft                | 0          |              |              | Sales User          |  |
| <input type="checkbox"/> | 2 Submitted for App... | 0          |              |              | Sales Manager       |  |
| <input type="checkbox"/> | 3 Approved by Sales... | 1          |              |              | Sales Manager       |  |
| <input type="checkbox"/> | 4 Cancelled            | 2          |              |              | Sales Manager       |  |

Add Row

### 1. Transition Rules :

For instance: A **Sales user** is only allowed to create a **Quotation** and it can be saved in the **Draft** state.

Further, it can be sent to the **Sales Manager** for approval and the User with this role can have the permission to either **Approve** or **Reject** the Quotation after which it can either be sent to the **Draft** State if **Rejected** or final **Approved** State.

### Quotation

Active

Menu
Save

TRANSITION RULES

Rules for how states are transitions, like next state and which role is allowed to change state etc.

Rules defining transition of state in the workflow.

Transitions

|                          | State                       | Action  | Next State           | Allowed       |  |
|--------------------------|-----------------------------|---------|----------------------|---------------|--|
| <input type="checkbox"/> | 1 Draft                     | Submit  | Submitted for App... | Sales User    |  |
| <input type="checkbox"/> | 2 Submitted for Approval    | Approve | Approved by Sales... | Sales Manager |  |
| <input type="checkbox"/> | 3 Submitted for Approval    | Reject  | Draft                | Sales User    |  |
| <input type="checkbox"/> | 4 Approved by Sales Manager | Cancel  | Cancelled            | Sales Manager |  |

Add Row

Workflow State Field

workflow\_state

Field that represents the Workflow State of the transaction (if field is not present, a new hidden Custom Field will be created)

Add a comment

Comment

Error Messages:

**A document cannot be Cancelled before it is Submitted.**

[This is a typical error faced by users who define the state of the Document cancelled before Submitting it. Doc Status 1 defines that the Document will be Submitted at that State, thus the State with Doc status 2 should only be defined in the Transition after the State with Doc status 1. ]

Setup a Simple Workflow to begin with and let us know what you think more on Workflows! We love to see our Users Happy!! ;)

## ARTICLE-USERS AND PERMISSIONS

### ➤ Difference Between System User and Website User

**Question:** I have added my Employee as a User and have assigned them Roles as well. Still, they are not able to view Dashboard on the login.

**Answer:**

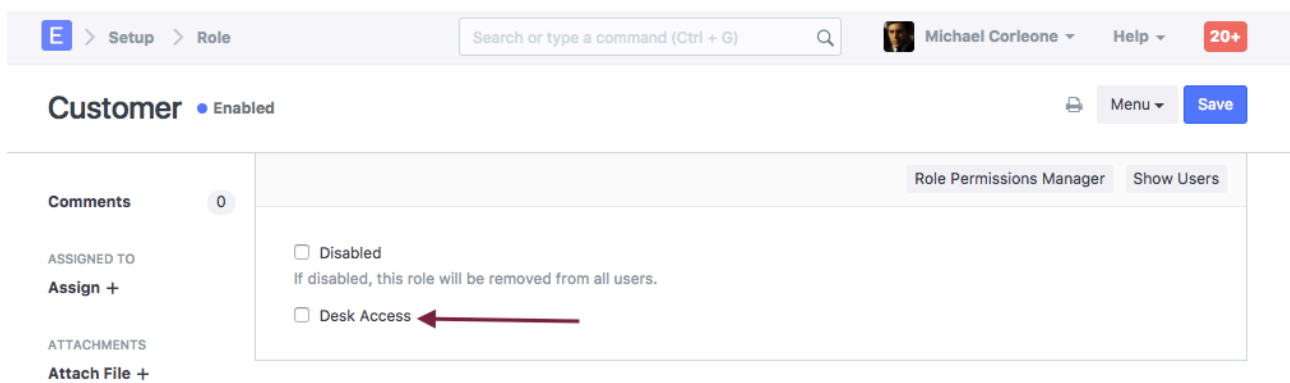
There are two type of Users in ERP.

- **System User:** They are Employees of your company. Example of Roles assigned to System Users are Account User, Sales Manager, Purchase User, Support Team etc.
- **Website User:** They are to parties (like Customer and Suppliers) of your Company.

Example Website User Roles are Customer and Suppliers.

How to check if Role is for System User or Website User?

In the Role master, if field "Desk Access" is checked, that Role is for System User. If Desk Access field is unchecked, then that Role is for Website User.

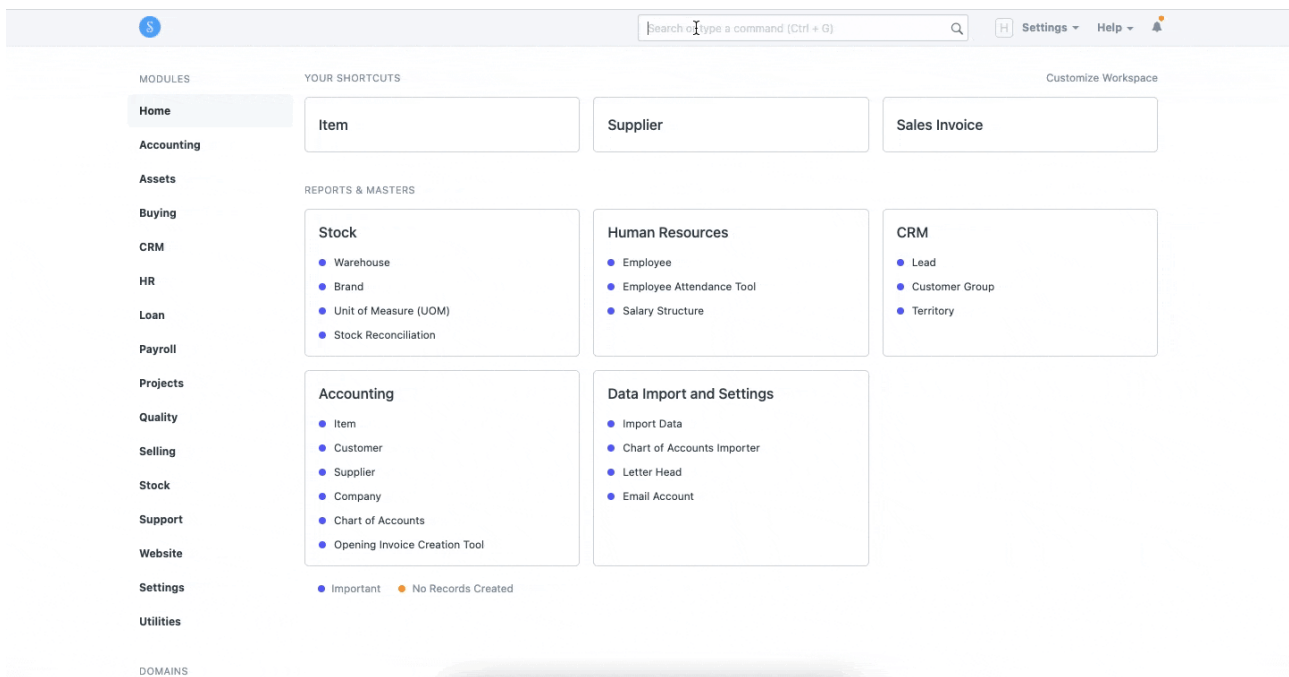


### ➤ Change existing user's email ID

To change a User's Email Id, follow the steps:

**User List -> Open the User (the one which requires the change) -> Click on Menu -> Rename -> Enter the New Email Id and Save it.**

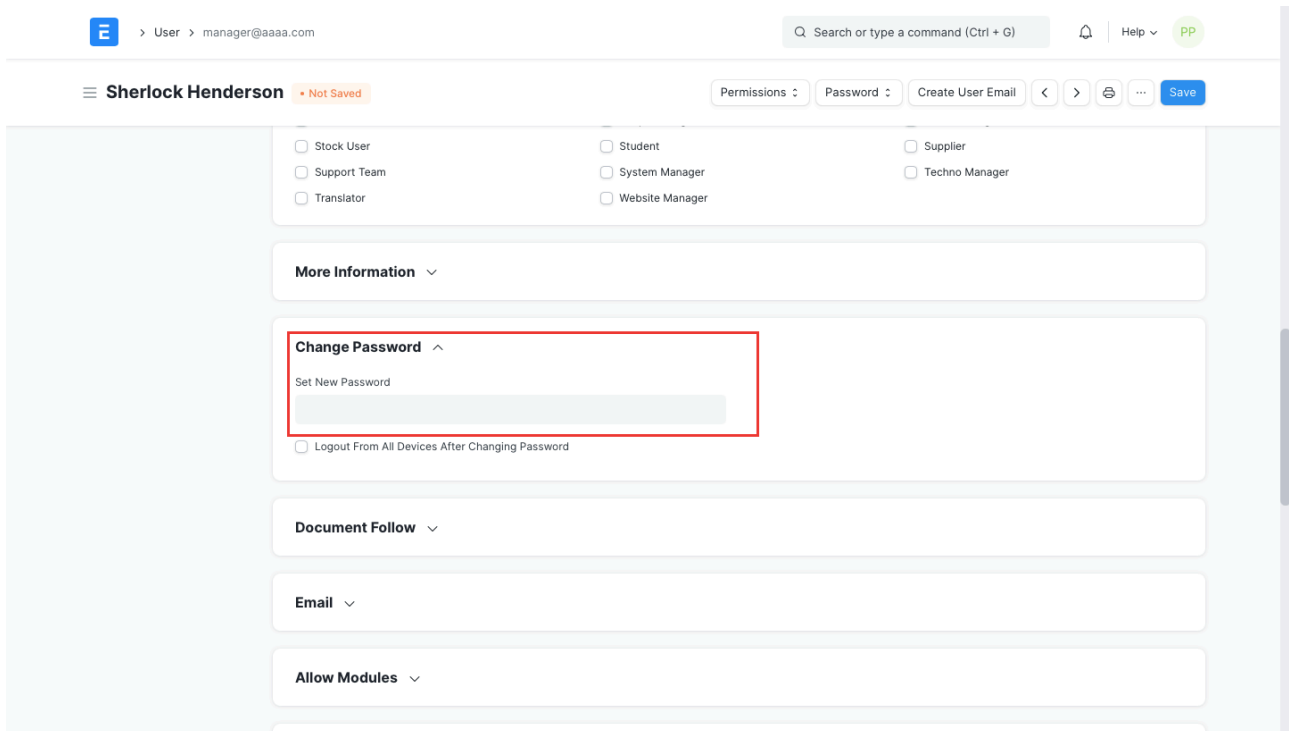
Refer to the GIF here illustrating the same:



## ➤ Change User Password

Each ERP user can customize password for his/her ERP account. Also user with System Manager role will be able to reset password for himself as well as for other users. Following are the steps to go about changing your password.

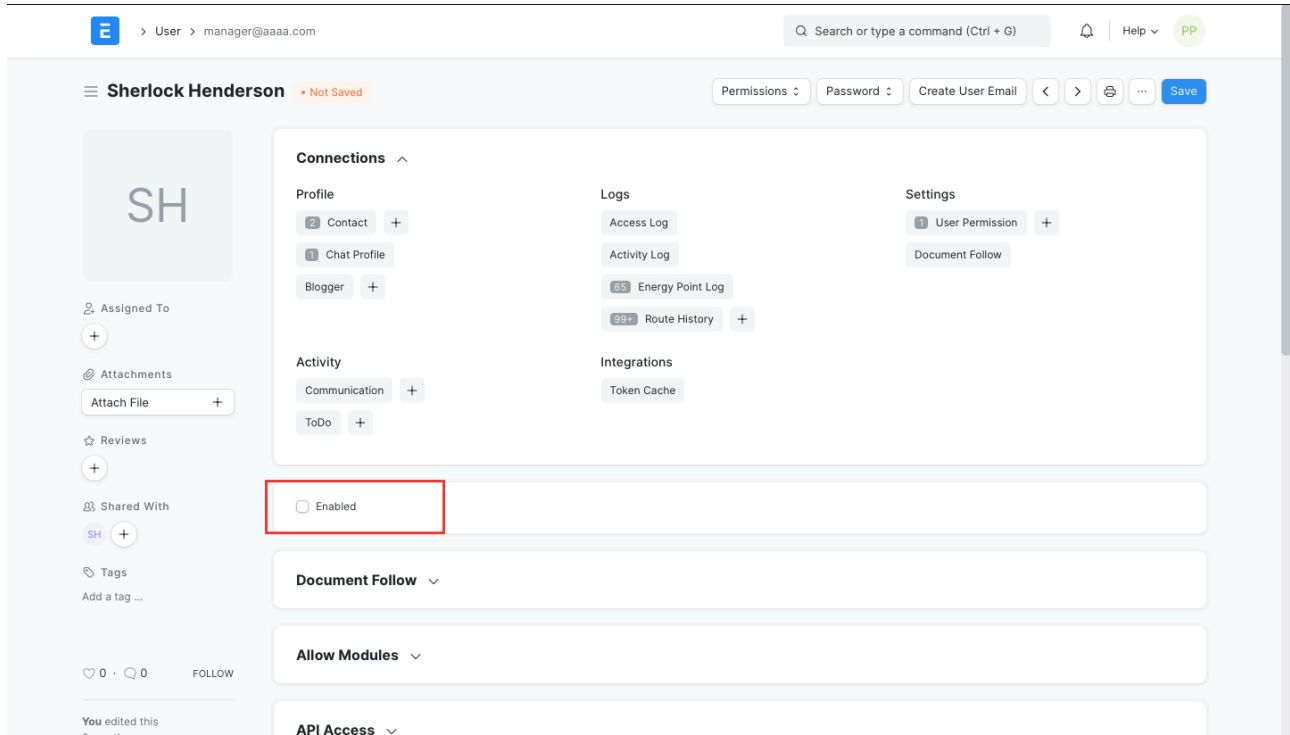
- 1) Go to User list
- 2) Open the user for whom you wish to change the password
- 3) Go to 'Change Password' section, enter the new password and save the changes



## ➤ Disable any user

To disable an ERP user who has left your company from accessing the system, follow the below given steps.

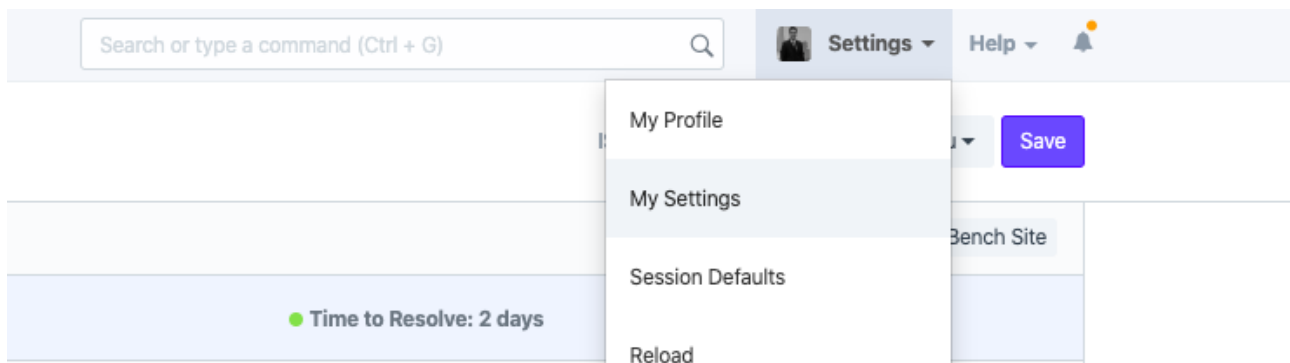
1. Type 'User List' in the awesome bar or search bar
2. Select the user you want to disable
3. Uncheck the 'Enabled' checkbox for the selected user
4. Save your changes



## ➤ Setting Up Email Signature in ERP

Q. How do I add my Email Signature in ERP?

To add your signature, go to your User Profile under **Settings > My Settings**



Scroll down to the **Email Settings** section where you can add your signature in HTML:



#### EMAIL SETTINGS ^

- ☒ Send Notifications for Email threads
- ☐ Send Me A Copy of Outgoing Emails
- ☒ Allowed In Mentions

Email Signature



### ➤ User Restriction

Following are the steps to restrict User to a document based on Owner/creator.

#### Step 1: Role Permission Manager\_

Home > Users and Permissions > Permissions > Role Permissions Manager

#### Step 2: Select Document Type\_

Select Document Type for which you want to set user permission. After permissions are loaded for selected document, scroll to role for which you want to set restriction.

E

A
Settings ▾
Help ▾

### Role Permissions Manager

Set User Permissions

Sales Order

Select Role...

| Document Type | Role       | Level | Permissions   |   |
|---------------|------------|-------|---|---|
| Sales Order   | Sales User | 0     | <input checked="" type="checkbox"/> Read <input checked="" type="checkbox"/> Write <input checked="" type="checkbox"/> Create | ✕ |

#### Step 3: Apply User Permission\_

For Role to be restricted (Sales User in this case), check "Only If Creator".

## Role Permissions Manager

Set User Permissions

Sales Order

Select Role...

| Document Type | Role  | Level | Permissions                                   |  |  |   |
|---------------|---|-------|---|--|--|---|
| Sales Order   | Sales User  | 0     | <input checked="" type="checkbox"/> Read      | <input checked="" type="checkbox"/> Write  | <input checked="" type="checkbox"/> Create | x |
|               | <input checked="" type="checkbox"/> Only If Creator |       | <input checked="" type="checkbox"/> Delete    | <input checked="" type="checkbox"/> Submit | <input checked="" type="checkbox"/> Cancel |   |
| Sales Order   | Accounts User                                       | 0     | <input checked="" type="checkbox"/> Amend     | <input checked="" type="checkbox"/> Print  | <input checked="" type="checkbox"/> Email  | x |
|               | <input type="checkbox"/> Only If Creator            |       | <input checked="" type="checkbox"/> Report    | <input type="checkbox"/> Import            | <input type="checkbox"/> Export            |   |
|               |   |       | <input type="checkbox"/> Set User Permissions | <input checked="" type="checkbox"/> Share  |  |   |
|               |   |       | <input type="checkbox"/> Delete               | <input type="checkbox"/> Submit            | <input type="checkbox"/> Cancel            |   |
|               |   |       | <input type="checkbox"/> Amend                | <input checked="" type="checkbox"/> Print  | <input checked="" type="checkbox"/> Email  |   |
|               |   |       | <input type="checkbox"/> Report               | <input type="checkbox"/> Import            | <input type="checkbox"/> Export            |   |
|               |   |       | <input type="checkbox"/> Set User Permissions | <input type="checkbox"/> Share             |  |   |

### Managing Perm Level in Permission Manager

Perm Level is way of reducing the amount information visible or changeable in a specific DocType for certain User Groups. Where as you can define visibility or changability for each DocType by customizing the DocType-specific Permissions Rule, with the Perm Level you can change these for specific Sections or Fields.

In each document, you can group fields by "levels". Each group of fields or field group is denoted by a unique number (0, 1, 2, 3 etc.). A separate set of permission rules can be applied to each field group. By default all fields are of level 0.

Perm Level (Abbreviated form of Permission Level) for a field can be defined in the [Customize Form](#).

E &gt; Selling

Search or type a command (Ctrl + G)

James Al Pacino

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## Customer

Menu

Refresh

New

Report  
Assigned To Me

Add Filter

☐ Full Name

Customer Group Territory

☐ Al Lettieri

Private All Territor

☐ Salvatore Corsitto

Private All Territor

☐ Guest

Private All Territor

☐ Neil

Commercial United States

☐ Atkins

Commercial United States

☐ Sonec LLP

Commercial United States

☐ Full Company

Commercial United States

7 d

0

7 d

0

7 d

0

2 m

0

2 m

0

3 m

0

2 m

0

0:00

If you need to assign different permission of particular field to different users, you can achieve it via Perm Level. Let's consider an example for better understanding.

Delivery Note is accessible to Stock Manager as well as Stock User. You don't wish Stock User to access Amount related field in Delivery Note, but other field should be visible just like it is visible Stock Manager.

For all related fields, that should not be seen, you can set Perm Level as (say) 2.

For Stock Managers, they will have permission on fields on Delivery Note with Perm Level 2, whereas a Stock User will not have any permission on Perm Level 2 for Delivery Note, because their role has not been assigned with a rule allowing them to read or write in Field with Perm Level of 2, as shown below.

E

Search or type a command (Ctrl + G)
James Al Pacino
276

### Role Permissions Manager

| Field  | Role          | Perm Level | Read                                | Write                               | Create                              | Delete                              | Submit                              | Cancel                              | Amend                               | Print                               | Email                               | Report                              | Import                   | Export                   | Share                               | Set User Permissions     |
|--|---------------|------------|-------------------------------------|-------------------------------------|-------------------------------------|-------------------------------------|-------------------------------------|-------------------------------------|-------------------------------------|-------------------------------------|-------------------------------------|-------------------------------------|--------------------------|--------------------------|-------------------------------------|--------------------------|
| Delivery Note  | Stock User    | 0          | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| <input type="checkbox"/> Apply User Permissions<br><input type="checkbox"/> If Owner |               |            |                                     |                                     |                                     |                                     |                                     |                                     |                                     |                                     |                                     |                                     |                          |                          |                                     |                          |
| Delivery Note  | Stock Manager | 1          | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |                                     |                                     |                                     |                                     |                                     |                                     |                                     |                                     |                          |                          |                                     |                          |
| Delivery Note  | Stock User    | 1          | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |                                     |                                     |                                     |                                     |                                     |                                     |                                     |                                     |                          |                          |                                     |                          |
| Delivery Note  | Stock Manager | 2          | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |                                     |                                     |                                     |                                     |                                     |                                     |                                     |                                     |                          |                          |                                     |                          |

+ Add A New Rule
Restore Original Permissions

Considering the same scenario, if you want a Stock User to access a field at Perm Level 2, but do not want to give permission to edit it, the Stock User will be assigned with permission to only be able to read on Perm Level 2, but not to write/edit.

E

Search or type a command (Ctrl + G)
James Al Pacino
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### Role Permissions Manager

| Field  | Role          | Perm Level | Read                                | Write                               | Create                              | Delete                              | Submit                              | Cancel                              | Amend                               | Print                               | Email                               | Report                              | Import                   | Export                   | Share                               | Set User Permissions     |
|--|---------------|------------|-------------------------------------|-------------------------------------|-------------------------------------|-------------------------------------|-------------------------------------|-------------------------------------|-------------------------------------|-------------------------------------|-------------------------------------|-------------------------------------|--------------------------|--------------------------|-------------------------------------|--------------------------|
| Delivery Note  | Stock User    | 0          | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| <input type="checkbox"/> Apply User Permissions<br><input type="checkbox"/> If Owner |               |            |                                     |                                     |                                     |                                     |                                     |                                     |                                     |                                     |                                     |                                     |                          |                          |                                     |                          |
| Delivery Note  | Stock Manager | 1          | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |                                     |                                     |                                     |                                     |                                     |                                     |                                     |                                     |                          |                          |                                     |                          |
| Delivery Note  | Stock User    | 1          | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |                                     |                                     |                                     |                                     |                                     |                                     |                                     |                                     |                          |                          |                                     |                          |
| Delivery Note  | Stock Manager | 2          | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |                                     |                                     |                                     |                                     |                                     |                                     |                                     |                                     |                          |                          |                                     |                          |
| Delivery Note  | Stock User    | 2          | <input checked="" type="checkbox"/> | <input type="checkbox"/>            |                                     |                                     |                                     |                                     |                                     |                                     |                                     |                                     |                          |                          |                                     |                          |

+ Add A New Rule
Restore Original Permissions

Perm Levels (1, 2, 3 or 2, 1, 3 or 3,2,1) do not need to be in any particular order. They do not imply hierarchy. Perm Level is primarily used for grouping number of fields together, and then assigning permission to Roles for that group. Hence, you can set any perm level for an item, and then do permission setting for it.

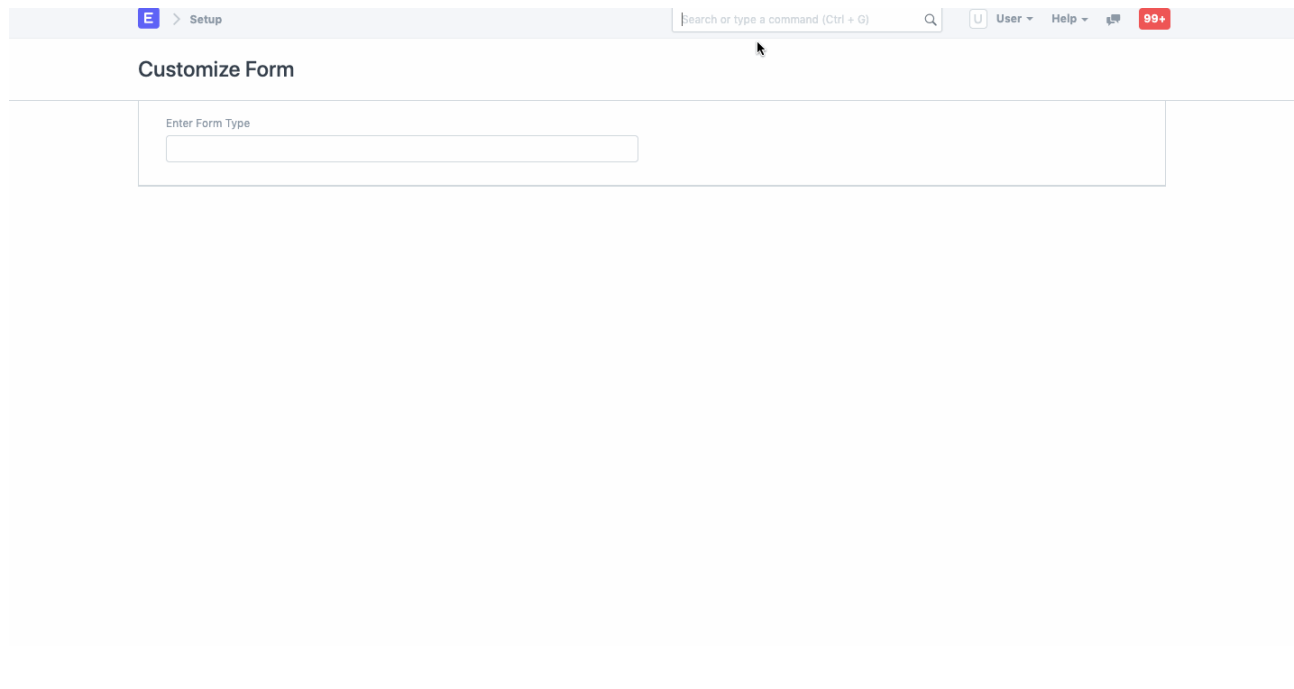
If you want to change permissions for all fields in a section, you can simply change the perm level for the section field and it will be applied to all fields in the section.

## ➤ Field Level Permission Management

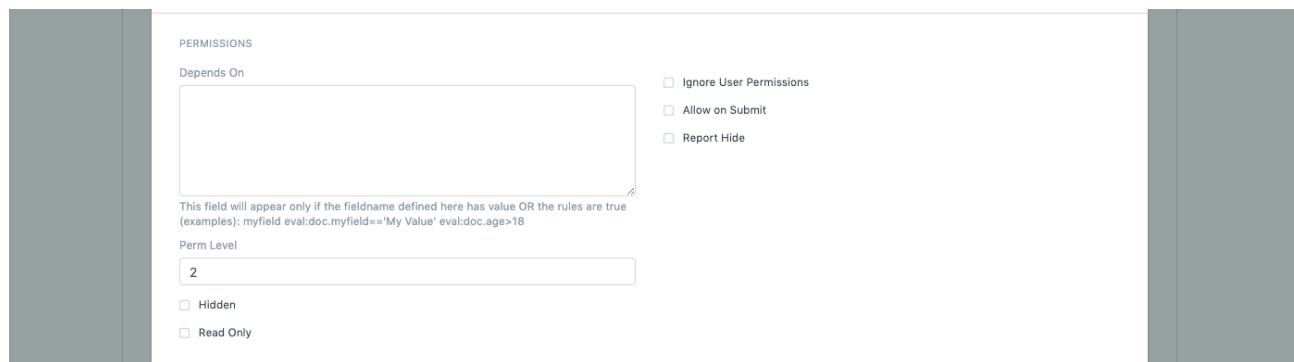
Restricting a field based on Roles can be easily configured using Perm Level, which is required by most organizations. To define a **Perm Level**, you can go to the respective form and Customize it.

Let's take a scenario where the organization doesn't want its Employee (Accounts User) to edit the Rate of the item while creating a **Sales Invoice**. To do that, we can simply make the **Item Rate** field a *read-only*.

1. To achieve this, go to **Customize Form**, select DocType as **Sales Invoice Item**, scroll to the **Item Rate** field and expand it.



2. Search for the **Perm Level**, enter the number (0, 1, 2, 3, etc), and *Save* it.



3. Once saved, click on **Add a New Rule** in Role Permission Manager and select the Document Type and the Role, in our case, *Accounts User*, set the Perm Level as 2 and grant the Employee Read access.

**Role Permissions Manager**

Document Type: **Sales Invoice**

Role: **Accounts User**

Permission Level: **2**

Level 0 is for document level permissions, higher levels for field level permissions.

Select the same as mentioned while customizing the field.

Click here to Add a New Rule

+ Add A New Rule

Restore Original Permissions

Set User Permissions

Permissions: ☒ Create, ☐ Cancel, ☒ Email, ☐ Export, ☒ Submit, ☐ Amend, ☒ Print, ☐ Import, ☐ Set User Permissions, ☒ Share, ☐ Delete, ☐ Report

This is how the Role Permissions Manager will display the newly created Rule with Perm Level as 2:

**Role Permissions Manager**

Document Type: **Sales Invoice**

Role: **Accounts User**

| Document Type | Role  | Level | Permissions   |
|---------------|---|-------|---|
| Sales Invoice | Accounts User<br><input type="checkbox"/> Only If Creator | 0     | <input checked="" type="checkbox"/> Read<br><input type="checkbox"/> Delete<br><input checked="" type="checkbox"/> Amend<br><input checked="" type="checkbox"/> Report<br><input type="checkbox"/> Set User Permissions |
| Sales Invoice | Accounts User   | 2     | <input checked="" type="checkbox"/> Read<br><input type="checkbox"/> Write  |

+ Add A New Rule

Restore Original Permissions

Set User Permissions

4. Now, as you can see in the Sales Invoice the User can only read the Item Rate field which will be fetched automatically from the Price List.

☐ Update Stock

Scan Barcode

| Item   | Quantity | Item Rate | Amount | Warehouse |
|--------|----------|-----------|--------|-----------|
| 1 Item | 0.0000   | 0.000     | 0.000  | Warehouse |

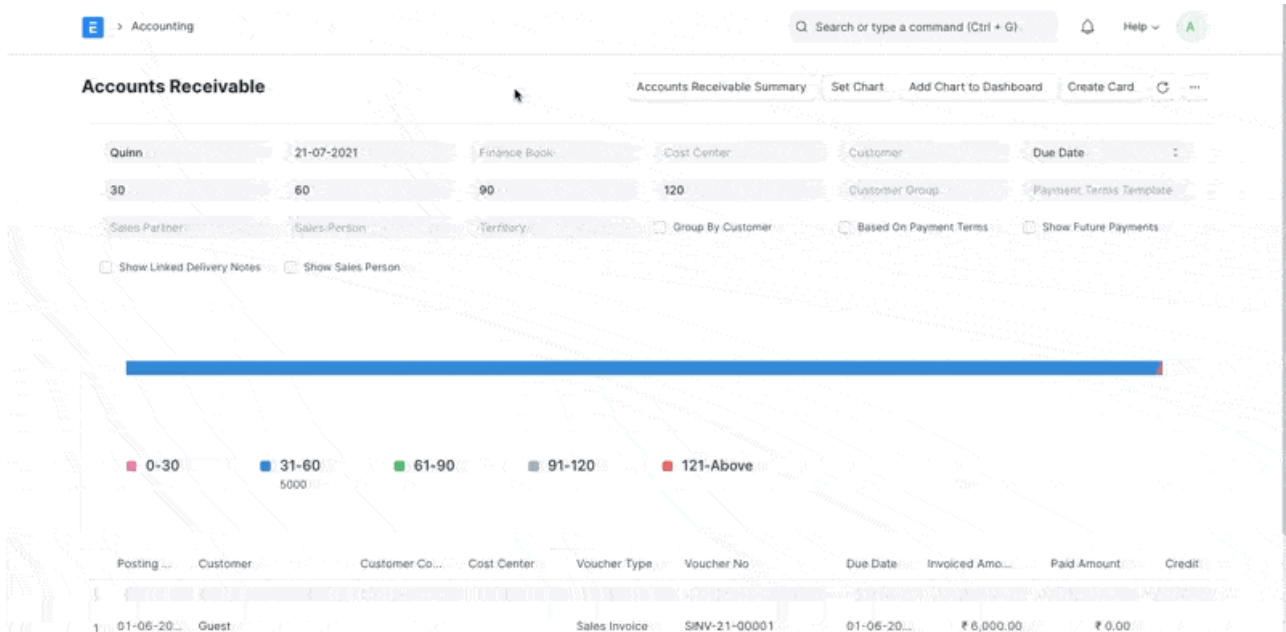
Add Multiple Add Row

Download Upload

## ➤ Edit Export/Print permissions for reports

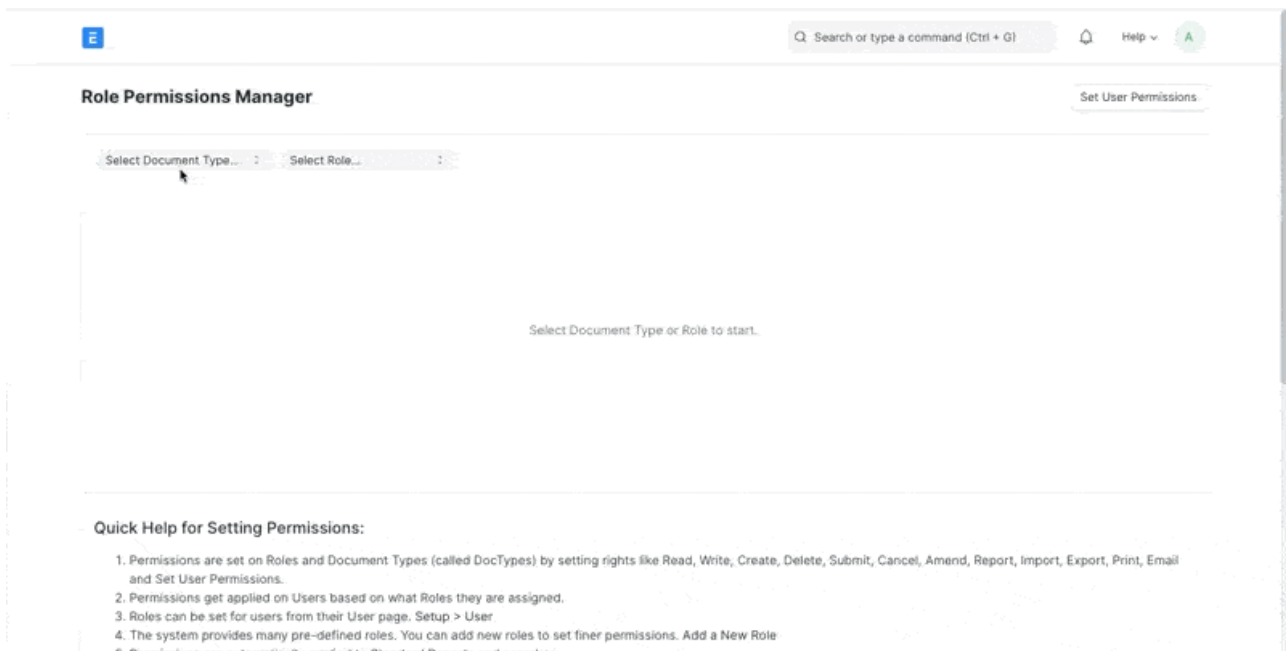
To handle Export/Print permissions for a report, use Role Permission Manager of the DocType the report is created from.

Step 1: Find out from which Document Type the Report is generated from



The screenshot shows the 'Accounts Receivable' report in Tally. The report is generated from the 'Sales Invoice' document type. The report shows a summary of accounts receivable for the period 01-06-2021 to 30-06-2021. The report is generated from the 'Sales Invoice' document type.

Step 2: Go to Role Permission Manager, filter using the same Document Type (*Sales Invoice in our example*) and edit the permissions based on Roles



The screenshot shows the 'Role Permissions Manager' in Tally. The 'Select Document Type' dropdown is set to 'Sales Invoice'. The 'Select Role' dropdown is set to 'Guest'. The permissions for the 'Guest' role are being edited.

**Quick Help for Setting Permissions:**

1. Permissions are set on Roles and Document Types (called DocTypes) by setting rights like Read, Write, Create, Delete, Submit, Cancel, Amend, Report, Import, Export, Print, Email and Set User Permissions.
2. Permissions get applied on Users based on what Roles they are assigned.
3. Roles can be set for users from their User page. Setup > User
4. The system provides many pre-defined roles. You can add new roles to set finer permissions. Add a New Role
5. Permissions are automatically applied to Standard Reports and queries.

## ARTICLE-ADVANCED SETTING

### ➤ Setting Workflows on Masters

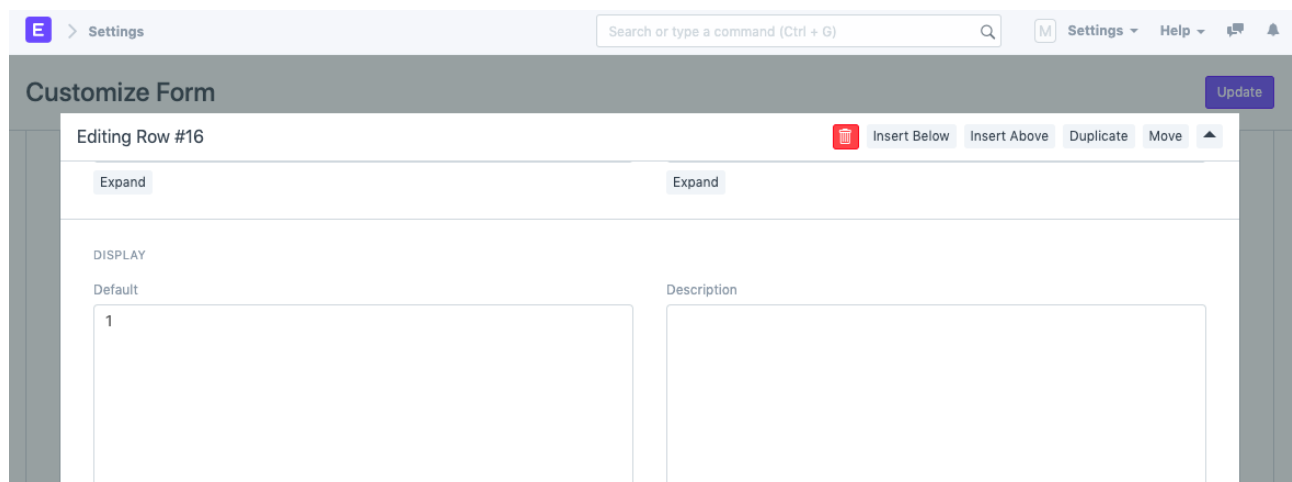
Workflows are usually set on submittable documents. Once the document is approved, it gets automatically submitted as per the workflow set. However, sometimes, businesses do have use cases where there is a need for approval of masters such as Items, Item Price, Pricing Rule, etc.

In ERP, these masters are non-submittable. Hence, even on rejection, sometimes, they are still active and you can use them in transactions. In this article, we have taken the example of the Item master. We will set a simple workflow on Item and make it active only when it has been approved. To do so, follow the below steps:

1) Make sure the master on which you are going to set the workflow has an Enable/Disable checkbox. If this is not present by default, you need to create one via Customize Form and set the default value as follows:

1. 0 if checkbox is "Disable"
2. 1 if checkbox is "Enable"

In our case, the Item master has a checkbox called "Disabled". We have set the default value as 1 in the Customize Form of the Item DocType as shown below.



The screenshot shows the 'Customize Form' interface for the Item DocType. The interface has a header bar with 'Settings' and a search bar. Below the header, there's a section titled 'Customize Form' with an 'Update' button. The main area shows a table with two columns: 'Default' and 'Description'. The 'Default' column has a value of '1' and the 'Description' column is empty. The table is titled 'Editing Row #16'. There are buttons for 'Expand', 'Insert Below', 'Insert Above', 'Duplicate', and 'Move'.

This means that every time a new Item is created, it will be disabled by default, unless approved (as seen in the screenshot below).

**E** > Stock > Item

Search or type a command (Ctrl + G)

**Sofa** Pending

Item Name: **Sofa**

Item Group: **All Item Groups**

HSN/SAC:

☐ Is Nil Rated or Exempted

☐ Is Non GST

☐ Is Item from Hub

☒ Disabled

☐ Allow Alternative Item

☒ Maintain Stock

☒ Include Item In Manufacturing

Valuation Rate: 0.00

☐ Is Fixed Asset

Over Delivery/Receipt Allowance (%): 0.000

2) Next, set the Workflow.

In the States table, on approval, make sure to update the "Disabled" (or Enabled) checkbox to 0 (or 1 in case of enabled) as shown below.

**E** > Settings > Workflow

Search or type a command (Ctrl + G)

**Item Approval** Active

Document States

|                          | State      | Doc Status | Update Field | Update Value | Only Allow Edit For |  |
|--------------------------|------------|------------|--------------|--------------|---------------------|--|
| <input type="checkbox"/> | 1 Pending  | 0          |              |              | All                 |  |
| <input type="checkbox"/> | 2 Rejected | 0          |              |              | Item Manager        |  |
| <input type="checkbox"/> | 3 Approved | 0          | disabled     | 0            | Item Manager        |  |

Add Row

TRANSITION RULES

Rules for how states are transitions, like next state and which role is allowed to change state etc.

Rules defining transition of state in the workflow.

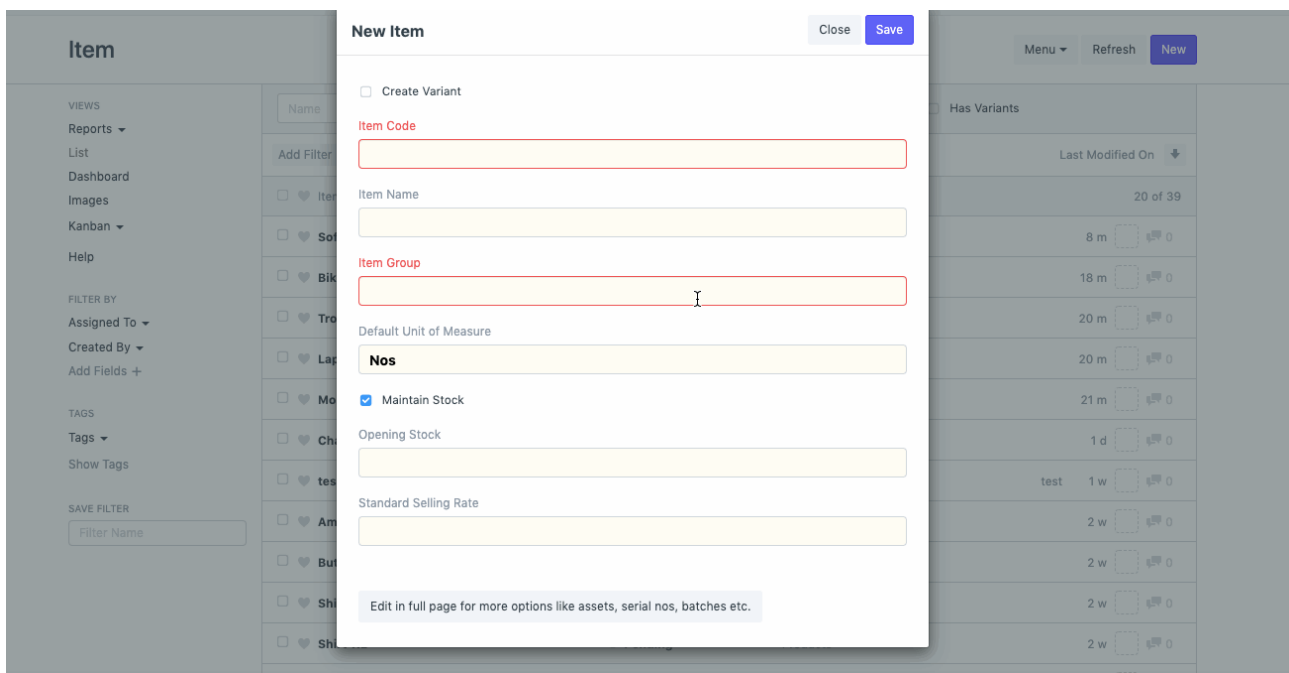
Transitions

|                          | State     | Action  | Next State | Allowed      |  |
|--------------------------|-----------|---------|------------|--------------|--|
| <input type="checkbox"/> | 1 Pending | Reject  | Rejected   | Item Manager |  |
| <input type="checkbox"/> | 2 Pending | Approve | Approved   | Item Manager |  |

This will ensure that whenever the Item is approved, the Item will automatically be enabled and you will be able to use it in transactions.

Check the below GIF to understand the workflow in detail:

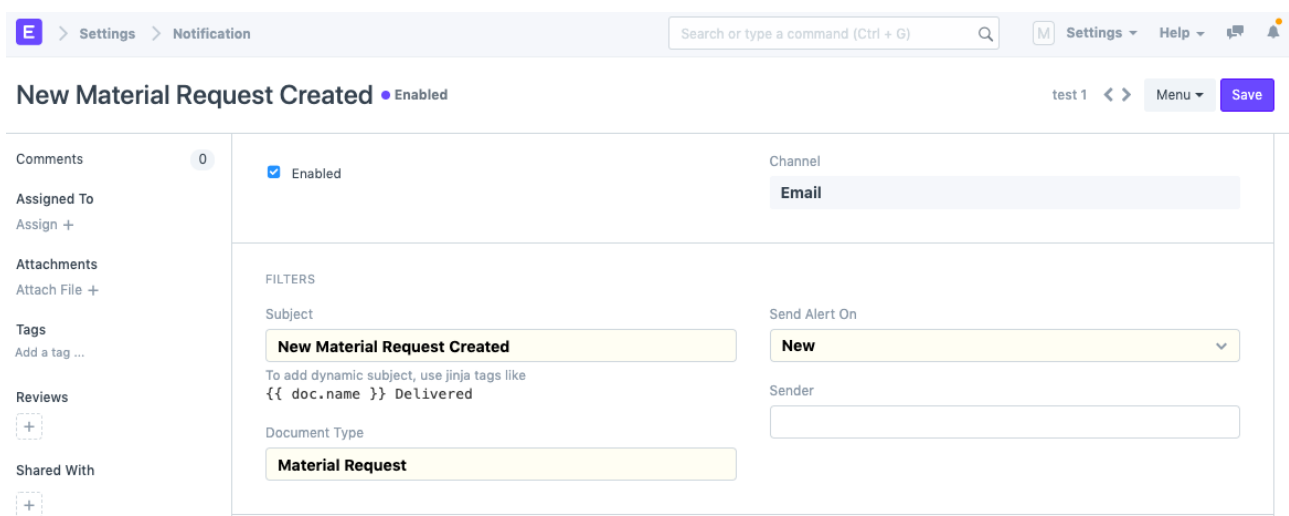




### ➤ Include Document Link in Notification Email

While sending an email notification in ERP, many a times, we need the document ID to be a part of the email message as a link. For example, if we have set a reminder (notification) for every new Material Request, then we would want the link of the new Material Request to be also sent in email to us. To set that up, following the below steps:

- 1) Go to Notification list, click on New.
- 2) Create a new Notification for any DocType. In this case, we have taken an example of sending an Email Notification on creation of every new Material Request as shown below.



- 3) To send the document ID of the associated record as a link, copy the below snippet in the email message:

```
<a href="{{frappe.utils.get_url_to_form(doc.doctype, doc.name)}}">{{doc.name}}</a>
```

E

> Settings > Notification

Search or type a command (Ctrl + G)

M

Settings

Help

test 1

< >

Menu

Save

## New Material Request Created Enabled

MESSAGE

Message

```

1 Hello,
2
3 New Material Request: <a href="{{frappe.utils.get_url_to_form(doc.doctype, doc.name)}}">{{doc.name}}</a> created.
4
5 Thanks,
6 Administrator
  
```

4) Now on creation of a new Material Request, following email will be received because of the above set Notification.

## New Material Request Created Inbox x



**ERPNext**  
to michelle ▾

Hello, New Material Request: [MAT-MR-2020-00107](#) created. Thanks, Administrator

On clicking the link, you will be taken to the new Material Request.

E

> Stock > Material Request

Search or type a command (Ctrl + G)

M Settings Help

Purchase Request for Paint Pending

MAT-MR-2020-00107

Menu Cancel

Comments 0

Assigned To Assign +

Attachments Attach File +

Tags Add a tag ...

Reviews +

Shared With +

♥

You edited this 3 minutes ago

You created this 3 minutes ago

56.01MB (0%) used

DASHBOARD

Related

Request for Quotation +

Supplier Quotation +

Purchase Order +

Stock Entry

Pick List

Manufacturing

Work Order

Type

Purchase

Required Date

05-06-2020

Company

The Bobo Company

Items

|                          | Item Code       | Quantity | UOM   | For Warehouse | Required Date |  |
|--------------------------|-----------------|----------|-------|---------------|---------------|--|
| <input type="checkbox"/> | 1 IT - 6: Paint | 1        | Litre | Stores - TB   | 05-06-2020    |  |

Create Stop

## ➤ Export Data in Excel/CSV

These are steps to export any data from a Doctype to Export/CSV format. Currently, you have to use Data Import for this:

1. Go to Data Export in your instance.
2. Select Document Type. Accounts for Chart of Accounts, Item, and so on along with the File Type (Excel/CSV).

## Data Export

[Export](#)

Select Doctype

Item

File Type

CSV

Add Filter

Select All

Unselect All

Item

- |   |   |  |
|---|---|--|
| <input checked="" type="checkbox"/> Item Code                 | <input checked="" type="checkbox"/> Variant Of                        | <input checked="" type="checkbox"/> Item Name  |
| <input checked="" type="checkbox"/> Item Group                | <input checked="" type="checkbox"/> HSN/SAC                           | <input checked="" type="checkbox"/> Is Item from Hub                                 |
| <input checked="" type="checkbox"/> Default Unit of Measure   | <input checked="" type="checkbox"/> Disabled                          | <input checked="" type="checkbox"/> Allow Alternative Item                           |
| <input checked="" type="checkbox"/> Maintain Stock            | <input checked="" type="checkbox"/> Include Item In Manufacturing     | <input checked="" type="checkbox"/> Opening Stock                                    |
| <input checked="" type="checkbox"/> Valuation Rate            | <input checked="" type="checkbox"/> Standard Selling Rate             | <input checked="" type="checkbox"/> Is Fixed Asset                                   |
| <input checked="" type="checkbox"/> Asset Category            | <input checked="" type="checkbox"/> Asset Naming Series               | <input checked="" type="checkbox"/> Allow over delivery or receipt upto this percent |
| <input checked="" type="checkbox"/> Brand                     | <input checked="" type="checkbox"/> Description                       | <input checked="" type="checkbox"/> Shelf Life In Days                               |
| <input checked="" type="checkbox"/> End of Life               | <input checked="" type="checkbox"/> Default Material Request Type     | <input checked="" type="checkbox"/> Valuation Method                                 |
| <input checked="" type="checkbox"/> Warranty Period (in days) | <input checked="" type="checkbox"/> Weight Per Unit                   | <input checked="" type="checkbox"/> Weight UOM                                       |
| <input checked="" type="checkbox"/> Has Batch No              | <input checked="" type="checkbox"/> Automatically Create New Batch    | <input checked="" type="checkbox"/> Batch Number Series                              |
| <input checked="" type="checkbox"/> Has Expiry Date           | <input checked="" type="checkbox"/> Retain Sample                     | <input checked="" type="checkbox"/> Max Sample Quantity                              |
| <input checked="" type="checkbox"/> Has Serial No             | <input checked="" type="checkbox"/> Serial Number Series              | <input checked="" type="checkbox"/> Has Variants                                     |
| <input checked="" type="checkbox"/> Variant Based On          | <input checked="" type="checkbox"/> Is Purchase Item                  | <input checked="" type="checkbox"/> Default Purchase Unit of Measure                 |
| <input checked="" type="checkbox"/> Minimum Order Qty         | <input checked="" type="checkbox"/> Safety Stock                      | <input checked="" type="checkbox"/> Lead Time in days                                |
| <input checked="" type="checkbox"/> Last Purchase Rate        | <input checked="" type="checkbox"/> Delivered by Supplier (Drop Ship) | <input checked="" type="checkbox"/> Manufacturer                                     |
| <input checked="" type="checkbox"/> Manufacturer Part Number  | <input checked="" type="checkbox"/> Country of Origin                 | <input checked="" type="checkbox"/> Customs Tariff Number                            |

3. Select the list of fields to be exported.

4. You can click on **Add Filter** to export data based on specific conditions.

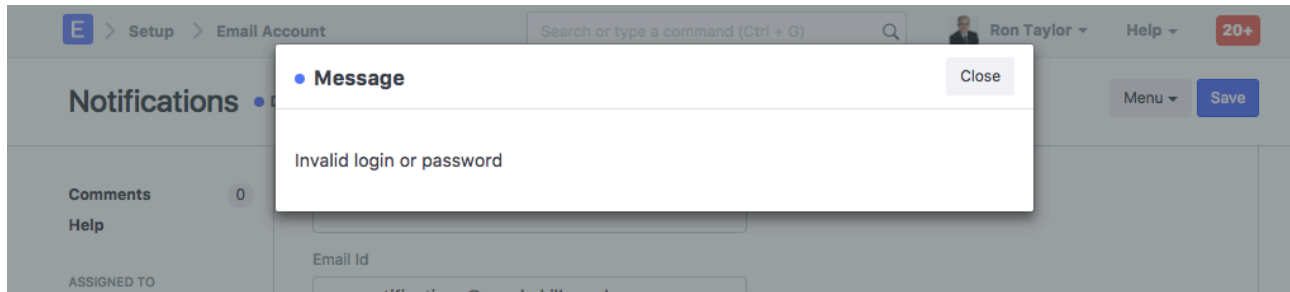
5. Once you are ready, click on the Export button.

This will export all your data in spreadsheets. You can open the file and check the same if it has the correct values (say accounts).

## ARTICLES-ERRORS AND REPORTS

### ➤ Email Error in Sending or Receiving

In ERP, you can customize the Incoming and Outgoing Email Gateway. On saving an Email Account, ERP tries establishing a connection with your email gateway. If your ERP account is able to connect fine, then Email Account is saved successfully. If not, then you might receive an error as below.

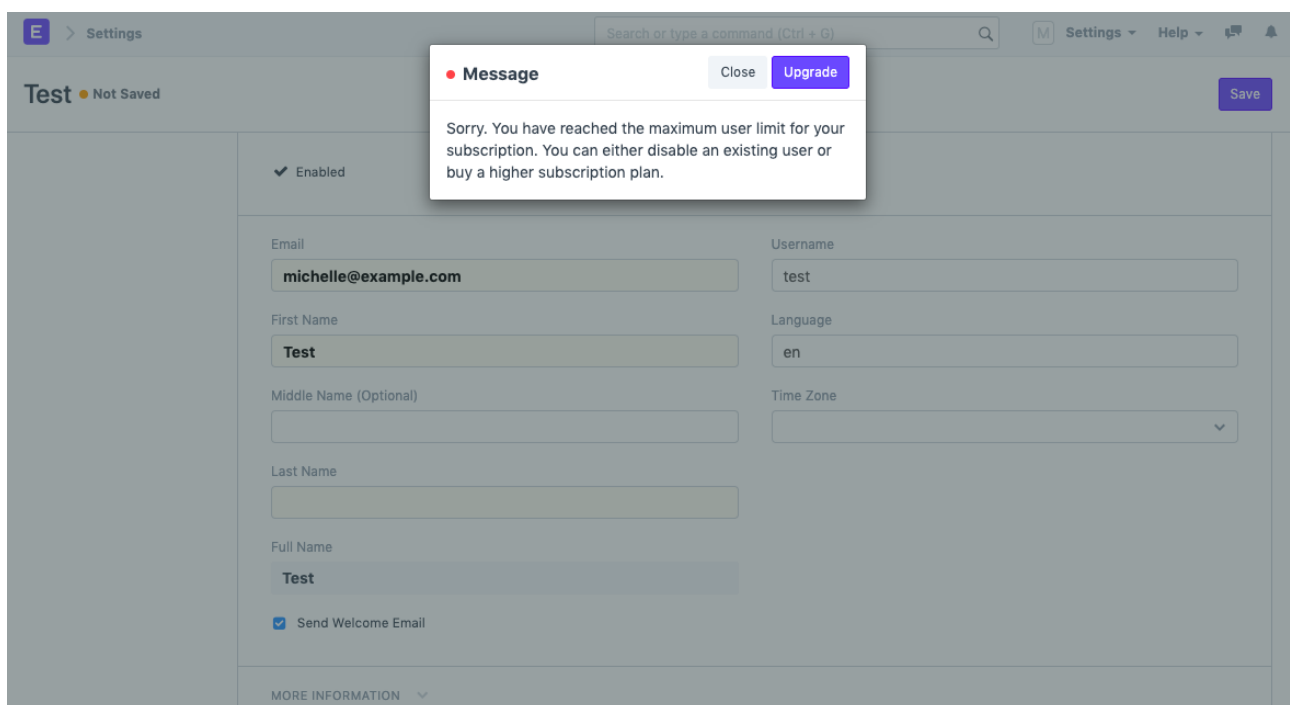


This indicates that using login credentials and other email gateway details provided in the Email Account, ERP is not able to connect to your email server. Please ensure that you have entered valid email credentials for your Email Gateway. Once you have configured Email Account successfully, you should be able to send and receive emails from your ERP account fine.

Note: Your ERP account is connected with an ERP email server by default. If you don't want to use your own email server, you can continue sending emails using ERP email server, without any configuration required in the Email Account.

### ➤ Maximum User Limit Issue

Your ERP subscription depends on the number of System Users you subscribe for. Once you cross that limit, the system will not let you create any further number of users. For example, you have subscribed for 10 users. If you already have already created 10 System Users in your account, the system wont let you create the 11th System User, and you will get the below message.



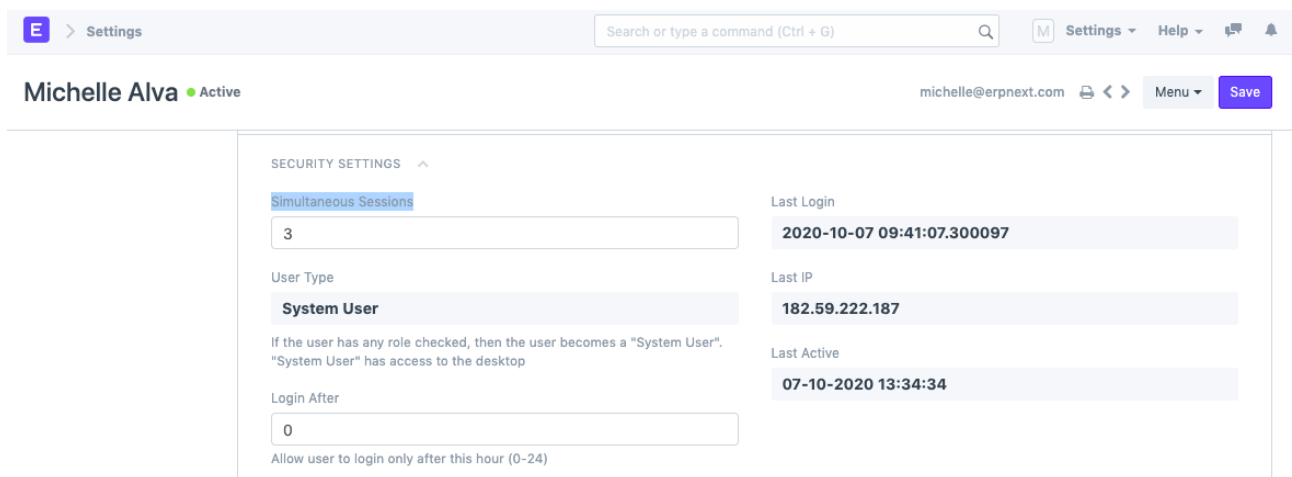
To fix this, you will either have to:

- 1) Buy new users or
- 2) Disable the current users

However, sometimes, you may still face this issue even when you have not exhausted the number of System Users as per your subscription plan. For example, you have a limit of 5 System Users and you have only created 3 users. Yet while creating the 4th user, you get the above message. The reason for this can be that for some of the uses, the field of "Simultaneous Sessions" is greater than 1.

Every simultaneous session is considered as 1 System User. For example, if you have created 3 users and one of them has "Simultaneous Session" set to 3, then you have a total of 5 users, i.e.  $3 + 1 + 1 = 5$  simultaneous sessions/system users.

To allow the system to let you create more users, you will have to reduce the simultaneous sessions of these users. To do so, go to the User's profile, under Security Settings, set/reduce the "Simultaneous Session" accordingly.



The screenshot shows the user profile for Michelle Alva (Active) in the ERPNext system. The 'Security Settings' tab is selected. The 'Simultaneous Sessions' field is highlighted and set to 3. Below it, the 'User Type' is 'System User'. A note states: 'If the user has any role checked, then the user becomes a "System User". "System User" has access to the desktop'. The 'Login After' field is set to 0. On the right, login details are shown: Last Login (2020-10-07 09:41:07.300097), Last IP (182.59.222.187), and Last Active (07-10-2020 13:34:34).

**Note:** You will still be able to create Website Users as there is no limit for the same.

### ➤ Import Error due to Workflow

When you import a document of a DocType which has a workflow, you shouldn't be able to set the workflow\_state to a state except the first.

For example, your Workflow has 4 states: **Draft, Sent for Approval, Approved, Rejected**.

You prepare records to import using Data Import Tool, and you set the workflow\_state of each record to **Approved**. The system will not allow this, because you are transitioning from the state **Draft** to **Approved** which is not a valid transition according to your workflow.

The solution is to disable the workflow, import your data and then enable the workflow again.

### ➤ Perm Level Error

While customizing rules in the [Permission Manager](#), you might receive an error message saying:

For System Manager (or any other role) at level 2 (or another level) in Customer (or any other document) in row 8: Permission at level 0 must be set before higher levels are set.

Error message indicates problem is in the existing permission setting for this document.

For any role, before assigning permission at Perm Level 1 or 2 (and so on), permission at Perm Level 0 must be assigned. Error message says that System Manager has been assigned permission at Perm Level 1 and 2, but not at level 0. You should first correct the permission for System Manager's role by:

- Assigning permission to System Manager at level 0.

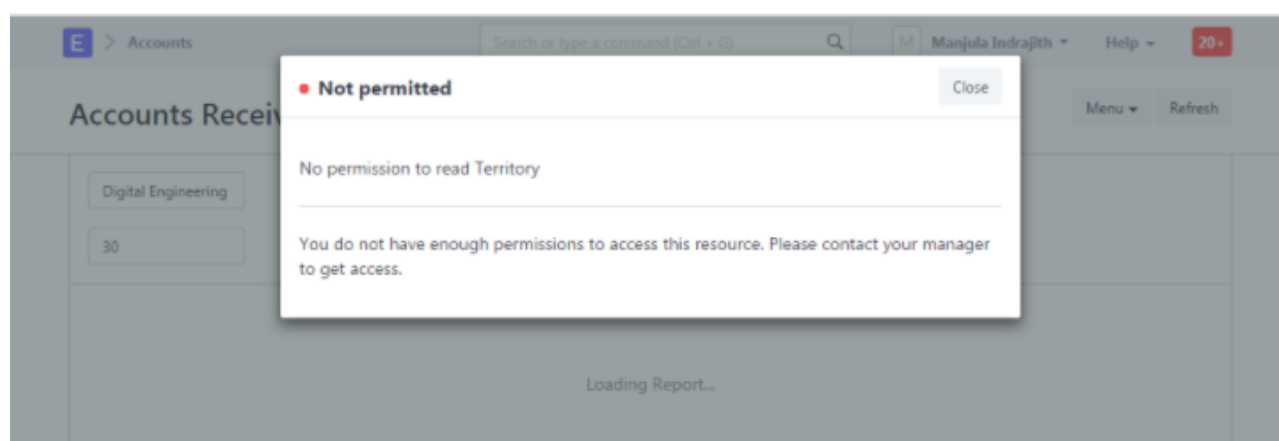
Or

- By removing permission at level 1 and 2.

After executing one of the above steps, you should be able to successfully add new permissions rules in the Role Permission Manager.

## ➤ Permission Error Problems

**Question:** User has roles like Account User and Account Manager assigned. Still, when accessing Account Receivable report, User is getting an error message of no permission the territory master.



**Answer:**

As per the permission system in ERP, for the User to be able to access a form or a report, s(he) should have at-least read permission on all the link field in that form/report. Since Territory is a link field in Account Receivable report, please add a permission rule to let Account User/Manager have at-least Read permission on the Territory master. Please follow below-given steps to resolve this issue.

1. Roles assigned to User are Account User and Account Manager.
2. As indicates in the Error message, the user didn't have permission on the territory master. As per the default permission, none of the above role assigned to that User has any permission on the Territory master.
3. To resolve this issue, I have assigned Account User permission to Read Territory master.

## Role Permissions Manager

Territory

Select Role...

| Document Type | Role   | Level | Permissions   |   |
|---------------|--|-------|---|---|
| Territory     | Accounts User  | 0     | <input checked="" type="checkbox"/> Read <input type="checkbox"/> Write <input type="checkbox"/> Create | x |
|               | <input type="checkbox"/> Apply User Permissions<br><input type="checkbox"/> If Owner |       | <input type="checkbox"/> Delete <input type="checkbox"/> Submit <input type="checkbox"/> Cancel         |   |
|               |  |       | <input type="checkbox"/> Amend <input type="checkbox"/> Print <input type="checkbox"/> Email            |   |
|               |  |       | <input type="checkbox"/> Report <input type="checkbox"/> Import <input type="checkbox"/> Export         |   |
|               |  |       | <input type="checkbox"/> Set User Permissions <input type="checkbox"/> Share                            |   |

As per this permission update, User should be able to access Account Receivable report fine.

### ➤ Using Prepared Report

Many times when generating a report that deals with a large volume of data, say, a GL report for the entire year, you may end up getting the following error message: **Request Timed Out**. This occurs as there is a lot of data to be processed and presented on the report page, but not enough server resource hence resulting in a time out.

For better processing of such reports, ERP offers Prepared Reports (since v11). When a report is set as a Prepared Report, it is generated through a [background job](#), and once ready, is available for users to view.

#### Steps to Set Up Prepared Reports

1. Go to [Role Permission for Page and Report](#).
2. In the field 'Set Role For' select **Report**.
3. In the 'Report' field select the report for which you want to enable/disable prepared report.
4. Use the **Disable Prepared Report** checkbox to enable/disable the prepared report. If the option is checked, the prepared report option will be disabled for the selected report.
5. Click on **Update**.



E

B
Settings ▾
Help ▾
🔔

MODULES
Show / Hide Cards

✓ Getting Started ▾

📁 Accounting ▾

📦 Selling ▾

🛒 Buying ▾

📦 Stock ▾

💰 Assets ▾

🚀 Projects ▾

📞 CRM ▾

✓ Support ▾

👤 Human Resources ▾

✓ Quality ▾

DOMAINS

🔧 Manufacturing ▾

PLACES

🌐 Website ▾

♥ Social

🏆 Leaderboard

📊 Dashboard

★ Marketplace

🔗 ERPNext Support

### How To Use A Prepared Report

1. Open said report (say General Ledger) and apply all filters needed.
2. If the prepared report option is enabled for that report, you will see a **Generate Report** button. Click on the same.

E

A
Settings ▾
Help ▾
🗨️
👤
99+

General Ledger

Menu ▾
Refresh
Generate New Report

Set Chart

Wayne Corp

Finance Book

30-11-2019

31-12-2019

Account

Voucher No

Party Type

Baron Industries

Group by Voucher (Consolidated)

Cost Center

Project

☐ Show Opening Entries

☐ Include Default Book Entries

Please set filters

For comparison, use >5, <10 or =324. For ranges, use 5:10 (for values between 5 & 10).

Execution Time: 0.1 sec

3. You will see a notification on the bottom-right of the screen saying "Report initiated. You can track its status [here](#)"

E

Search or type a command (Ctrl + G)

Settings Help 99+

### General Ledger

Menu Refresh Generate New Report

Wayne Corp

Finance Book

30-11-2019

31-12-2019

Account

Voucher No

Supplier

Baron Industries

Group by Voucher (Consolidated)

Cost Center

Project

☐ Show Opening Entries
 ☐ Include Default Book Entries

This is a background report. Please set the appropriate filters and then generate a new one.

For comparison, use >5, <10 or <=324. For ranges, use 5:10 (for values between 5 & 10).

Execution Time: 0.1 sec

Report initiated. You can track its status [here](#)

4. You can either wait on the said screen or click on *here* in the above message to open the page for the report. This will open a new page for the report:

E

Settings > Prepared Report

Search or type a command (Ctrl + G)

Settings Help 99+

### General Ledger Queued

REP27072 < > Menu

Comments 0

Assigned To Assign +

Attachments  
 2019-40-31-20:12.json...

Tags Add a tag ...

Reviews +

Shared With +

You edited this an hour ago  
 You created this an hour ago

Report Start Time

31-12-2019, 8:40 pm IST

FILTERS

| Filter      | Value                           |
|-------------|---------------------------------|
| Party Type  | Supplier                        |
| Company     | Wayne Corp                      |
| Project     |                                 |
| From Date   | 2019-11-30                      |
| Group By    | Group by Voucher (Consolidated) |
| Party Name  | Baron Industries                |
| To Date     | 2019-12-31                      |
| Party       | Baron Industries                |
| Cost Center |                                 |

As you see, the report page has status as "Queued". Once the report is ready, you will see a **Show Report** button which you can click to view the report:

E

Settings > Prepared Report

Search or type a command (Ctrl + G)

Settings Help 99+

General Ledger Completed

REP27072 Menu Show Report

Comments 0

Assigned To Assign +

Attachments 2019-40-31-2012.json... Attach File +

Tags Add a tag ...

Reviews +

Shared With +

You edited this 2 hours ago

You created this 2 hours ago

Report Start Time 31-12-2019, 8:40 pm IST

Report End Time 31-12-2019, 8:40 pm IST

FILTERS

| Filter      | Value                           |
|-------------|---------------------------------|
| Party Type  | Supplier                        |
| Company     | Wayne Corp                      |
| Project     |                                 |
| From Date   | 2019-11-30                      |
| Group By    | Group by Voucher (Consolidated) |
| Party Name  | Baron Industries                |
| To Date     | 2019-12-31                      |
| Party       | Baron Industries                |
| Cost Center |                                 |

- Since Prepared Report is also a doctype, to view the list of Prepared Reports, you can use the [Role Permission Manager](#) to grant access to the same.

### ➤ What if Emails are not being received by the Recipients?

When an Email is sent, you assume that the Email will be received by the Recipient, but if you receive a feedback that they haven't received the Email, following are the steps to troubleshoot:

- 1) Sending an Email to an Email address that is misspelled or does not exist results in that Email not being delivered. While it seems obvious, it is easily overlooked and happens often.
- 2) The second thing you can do to check is to send an Email to yourself, this can be done via creating a New Communication.

*Go to Communication List > Click on New.*

- 3) If the above method fails, kindly configure your Email Account again.

*Go to Email Account > Open the Email to check > if as per you everything is correct, click on Save. It will throw an error if there is any issue with the Configuration and you can rectify it accordingly.*

- 4) Check Email Queues for the unsent messages or errors if any.

*If the state is Error(as in the screenshot below), you can find the error cause by opening that email and scroll down to Error field to know the error.*

## Email Queue

Menu Refresh

SAVE FILTER

Filter Name

ae892a622

Error

ae892a622

4 d

0

ae892a622 Error

Menu

Status

Error

Error

(530, b'5.7.0 Authentication Required. Learn more at\n5.7.0 https://support.google.com/mail/?p=WantAuthError h10sm3865070wml.18 - gsmtp', 'Support <example@mail.com>')

**NOTE:** The error can differ from what can be seen in the above screenshot.

**END**